CURRENT FAMILY RELOCATION PROCEDURES

AT THE

GOVERNMENT CENTER SITE OFFICE

OF THE

BOSTON REDEVELOPMENT AUTHORITY

VOL. I

SITE OFFICE RELOCATION RECORDS
FAMILY RELOCATION
RESIDENTIAL CLAIMS

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MANAGEMENT SERVICES ASSOCIATES, INC.
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NEW YORK 13, NEW YORK

CURRENT PROCEDURES

FOR

SITE OFFICE RELOCATION RECORDS

Government Center, Boston

The following procedures are those being followed at the Government Center Project.

They are reported in an informal, narrative style, reflecting the fact that they were developed through interviews with Site Office personnel. They provided the basis for the Recommendations set forth in PART III of the report, "A Comprehensive Family Relocation Program for the Boston Redevelopment Authority."

CURRENT PROCEDURES

SITE OFFICE RELOCATION RECORDS

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CURRENT PROCEDURES

SITE OFFICE RELOCATION RECORDS

The immediate staff of the Site Office Manager prepare and control the official relocation records. This record keeping is in the charge of an administrative assistant (hereafter referred to as the AA).

> NOTE: On GCP, the official title of the administrative assistant is Relocation Payment Clerk - Relocation Assistant.

Throughout all of these procedures for a Site Office, the staff of the Site Office Manager is referred to collectively as the Office.

PROJECT BOUNDARIES AND MAPS

Maps of site boundaries are prepared by the Planning Department and furnished to the Site Office. Initially, these consist of 1 large wall map; 2 smaller wall maps, showing staging areas; and individual block maps, showing numbered blocks and parcels, in sufficient quantity to supply the Relocation Assistants (hereafter referred to as RA's) who make the initial site survey.

Additional maps are furnished as changes in staging areas may warrant.

LIST OF OWNERS

At the beginning of the project, the Real Estate office furnishes a hectographed list of all owners of structures, arranged by block and parcel. The list includes the following information about each structure: block and parcel number; name and address of owner; and area of structure in square feet.

This list is used by any staff member needing to contact owners, or to verify owner-occupancy, etc.

INITIAL SURVEY OF SITE OCCUPANTS

Prior to taking, after the site boundaries have been determined and the maps have been received, the area is divided among the RA's and they make a survey of the entire site area, interviewing all the occupants.

The SITE OCCUPANT SURVEY (Form SO-1)[1] is used for residential tenants and the SURVEY OF NON-RESIDENTIAL SITE OCCUPANTS (Form SO-2) for business and professional tenants.

NOTE: See Appendix for discussion of survey of roomers on GCP.

Form SO-1 provides for the following information: name and address of occupant; family size and composition; occupation(s) and income(s); citizenship and veteran status; race; eligibility for public housing; current housing information; relocation requirements and preferences; special relocation problems; remarks. This information is later recorded on the SITE OCCUPANT RELOCATION RECORD (Form SO-14). The form is later filed in the individual account folder (see below, under Tenant Account Folders).

Form SO-2 provides for the following information: name, address and phone number of the business; whether owner or tenant in building; age of owner (if sole proprietor); name and title of person interviewed; type of business; type of ownership; number of employees; gross business; number and area of floors occupied; rent per month; to whom paid; annual rent per sq. ft.; lease and term, if any; management services rendered; personal property owned by tenant; duration of occupancy; trade area(neighborhood, city, state, national); whether will remain in business; whether will require aid in relocating. This information is later recorded on the SITE OCCUPANT RECORD CARD - NON-RESIDENTIAL (Form SO-15; see below, under Tenant Control). The form is later filed in the Survey Book, described below.

As they conduct each interview, the RA's write the block and parcel numbers on the Survey Sheet. In addition to the two Survey forms, each RA is provided with a List of Instructions (Form SO-3) containing questions to ask, in addition to those on the forms, and a list of documents to see.

Concurrently with the interviewing of site occupants, the RA's record information about the buildings, using a form called Description of Structures (Form SO-4). This form provides for the following information: address; block number;

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[1]The number in parentheses (SO-1) is the first of a series of numbers assigned by MSA for identification of all forms used by the Office in its relocation records. Where a title is printed on the form, it is written here in all capital letters. The legend of rubber stamps also is written in all capital letters.

parcel number; general description of building (this includes a list of all occupants and the part(s) of the building each occupies). This information is later recorded on the STRUCTURE CONTROL CARD (Form SO-13; see below, under Structure Control). The form is later filed in the Survey Book.

The Site Office Manager, an Accountant from the Comptroller's office and the AA, working as a team, check over the completed forms. With the Survey sheets (Forms SO-1 and SO-2) arranged in order by block, and by parcel within block, they assign individual account numbers to all residential and nonresidential tenants (except roomers; see note below, under Tenant Control).

Occasionally, additional occupants are discovered after the account numbers have been assigned (overlooked initially because they occupy an obscure part of a building or an inner office in another occupant's quarters). These are given the next successive account numbers. With these exceptions, the account numbers are in block and parcel order. The account number control is maintained by the Comptroller.

Rents are checked on all Survey forms. If the rent is missing on any sheet, it must be supplied. For tenants or for former owners occupying space in buildings with other tenants, comparable rents are assigned. For former owners who are sole occupants, nonresidential rents are set by the Real Estate office and residential rents are set by the Site Office Manager. In the case of a nonresidential sole occupant, the rent is based on a fair charge for the space occupied, taking into account the amount of building service, heat and utilities involved. For a residential sole occupant, the rent is based on a fair charge for the size, type and location of the dwelling. If the Site Office Manager finds a tenant's rent that is clearly out of line with that paid by other tenants for comparable space, he is authorized to reduce it to a fair charge.

The Accountant makes a card for each account, from which the Comptroller's office later makes up the Rent Roll.

A looseleaf notebook, called a Survey Book, is made up for each block. All copies of the Description of Structures (Form SO-4) are filed in the appropriate books, in order by parcel number. Behind each Description sheet are filed the SURVEY OF NON-RESIDENTIAL SITE OCCUPANTS (Form SO-2) for all business tenants in the building, in order by account number.

The Survey Books are marked on the spine with the block number and filed in file drawers, in order by block number. They are accessible to all of the staff.

NOTIFICATION OF SITE OCCUPANTS

Immediately after the Board approves the taking, the AA sends letters to all site occupants, by certified mail, return receipt requested.

The Notification Letter (Form SO-5) includes the following information: account number; address; amount of current rent (taken from Form SO-1); beginning date of rental period; date payable; announcement of taking; instructions concerning payment of rent to BRA; penalties for failure to pay; statements concerning building services, prorated refunds in event of moving and removal of personal fistures; and date. It is signed by the Site Office Manager.

NOTE: On GCP, two buildings were continued under the management of First Realty Company. The occupants of these buildings received a special Notification Letter (Form SO-6). It differed from Form SO-5 in stating that First Realty Company would continue to manage the property and would serve as Management Agent to BRA. It also instructed the occupants to pay their rent to the Agent.

On GCP, the title "Project Manager" was used on the Notification Letters, instead of "Site Office Manager."

The Letter is printed in duplicate (original on white; file copy on yellow). The individual information and inside address are typed in. The file copy is filed in the individual account folder (see below, under Tenant Account Folders).

The Letter is the same for all occupants (with the exception noted above). It is accompanied by one of two Informational Statements - for residential or for nonresidential occupants.

The INFORMATIONAL STATEMENT TO RESIDENTIAL SITE OCCUPANTS (Form SO-7) contains the following information: date; purpose of taking; legal provision for relocation assistance; services and payments available; location of Site Office; instructions concerning continued occupancy and payment of use and occupancy charge.

NOTE: The term "use and occupancy charge" is the legally correct term used officially instead of "rent." For convenience, the term rent is used in the Site Office and in these procedures (except when listing titles or contents of forms in which the official term is used).

The INFORMATIONAL STATEMENT TO NON-RESIDENTIAL SITE OCCUPANTS (Form SO-8) contains the following information: date; purpose of taking; authorization;

offer of relocation assistance; location of Site Office; instructions concerning payment of use and occupancy charge; list of procedures to follow to expedite claims.

Since a copy of the appropriate Statement always accompanies the Notification Letter, and since only the date is not printed on the form, no file copy is kept. The date is stamped on in red.

A RETURN RECEIPT (Form SO-9; POD Form 3811) is prepared by the AA to accompany each Notification Letter. The Comptroller obtains a block of numbers from the Post Office for the Site Office to use for registered or certified mail.

NOTE: The Comptroller notifies the AA of the numbers orally; he sends no document for the files.

Using a numbering machine, the AA numbers the Receipt, the Window Envelope (Form SO-10) and the APPLICATION FOR REGISTRATION AND CERTIFICATE OF DECLARED VALUE OF MATTER SUBJECT TO POSTAL SURCHARGE (Form SO-11; POD Form 3877). A rubber stamp is used to fill in the Site Office return address on the Receipt, Envelope and Application. Rubber stamps are also used on the Envelope and Application for RETURN RECEIPT REQUESTED and CERTIFIED MAIL NO.

The Application is made up in duplicate and sent with the letters to the Post Office, by hand. The carbon copy is receipted by the Post Office and returned to the Office, where it is filed in a folder labeled "List of Residential and Nonresidential Letters," with the latest on top.

The Application form provides for listing: name and address of the sender (rubber stamp); numbers of articles (numbering machine); names and addresses of addressees; postage; registry fee; fee for return receipt; delivery-restricted-fee paid; value; surcharge on entire contents of articles; remarks; total number of pieces listed by sender; total number of pieces received at Post Office; signature of receiving (Post Office) employee.

NOTE: BRA does not require delivery to addressees only and there is no value, so the columns for "Delivery-Fee Paid," "Value" and "Surcharge" are not filled in.

If the Post Office returns any Letters undelivered (which may mean refused), the AA has one of the RA's go out to see if the occupant has already moved out. If the tenant is still occupying the premises, the RA tries to deliver the Letter. If it is refused, he brings it back to the Office.

The AA then prepares an inter-office memorandum to the Legal Department,

listing the account number, name and address of each such tenant and requesting that they be served by a Constable. The Legal Department prepares a duplicate of the letter that the AA had sent and the Constable serves it.

If the Constable gets the tenants to accept and sign, the Legal Department sends the AA an inter-office memorandum, listing the account number, name and address of those who signed. The AA makes up a REFERENCE SHEET (Form SO-12) for each tenant, noting the acceptance, and files it in the individual account folder.

The REFERENCE SHEET provides for: account, block and parcel numbers; name and address of tenant, including floor or apartment number; remarks; date; name of person preparing form. It is used by all persons providing supplementary information for inclusion in the official account folders.

STRUCTURE CONTROL

A card record is kept of all structures in the area, listing all tenants in each and their location within the structure. The cards are filed by block, one block to a folder, and by parcel within the folder.

The STRUCTURE CONTROL CARD (Form SO-13) is prepared for each structure, taking the data from the Description of Structures (Form SO-4). The form provides for the following information: block and parcel numbers; description; address; owner's name and address; occupancy use (of structure); 4 columns - name of occupant, apartment, occupancy use (of tenant), date vacated; and a block for Fuel Inventory - date, quantity, dollar value, type of heating facilities. The card is ruled for 19 entries.

> NOTE: On GCP, the fuel inventory data were not filled in on the cards.

At the end of each month, the AA records on the respective Control Cards the date when each tenant moved out, working wtth the accumulated Site Occupant cards (Forms SO-14 and SO-15) for the month (see below, under Tenant Control). This is done by typing in the date moved on the appropriate line under "Date Vacated" on the Form SO-13.

When an entire structure is vacant, the AA makes up an inter-office memorandum in quadruplicate: original for the Site Engineer; 1 copy to the Chief Inspector; 1 copy to the Superintendent of Maintenance; and 1 filed in a folder labeled "Vacant Buildings," in the Office file.

Upon receipt of this memorandum, the Site Engineer releases the building(s) to the demolition contractor.

Even when the entire structure is vacant, the Card is returned to the regular folder with all the other STRUCTURE CONTROL CARDS, and when the entire block is vacant, the folder is still kept with all the other folders, so that it will be easy to find quickly.

TENANT ACCOUNT FOLDERS

A folder is made up for each account number. The label includes: account number; surname of tenant; address; apartment or floor; block; and parcel.

The folders are placed in two separate files - residential and nonresidential. Both are arranged by block and parcel. For an alphabetical cross-reference, the visible file in the Cashier's office is used (see Rent Collection procedures).

Material filed in the account folders for residential tenants includes: original SITE OCCUPANT SURVEY (Form SO-1); copy of Notification Letter (Form SO-5 or SO-6); RETURN RECEIPT (Form SO-9) from that letter; copy of relocation Questionnaire (Form F-6; see Family Relocation procedures); REFERENCE SHEETS (Form SO-12); copies of any forms the tenant may have signed, such as Rent Affidavit or Owner's Rent Waiver (Forms SO-19 and SO-22; see below, under Rents); pink copies of Rent Receipts (Form C-3; see Rent Collection procedures); etc. This material is fastened into the folders with Acco fasteners.

NOTE: If the tenant is a hardship case, confidential Hardship Reports (Form F-13) are filed in a folder labeled "Confidential - Social Service," in order by account number (see Family Relocation procedures; on GCP, these reports come from the separate Social Service Unit).

A pink cross-reference sheet is fastened inside the front of the account folder, stamped CONFIDENTIAL - SEE SOCIAL SERVICE.

Material filed in the account folders for nonresidential tenants includes the same type of items as listed above for residential tenants, with one exception: the original SURVEY OF NON-RESIDENTIAL OCCUPANTS (Form SO-2) is filed in the Survey Books, not in the account folders.

When any tenant moves out, the account folder is stamped VACANT and the date, and removed to another file, still separating residential from nonresidential and still by block and parcel. In the case of a nonresidential tenant, the SITE OCCUPANT RECORD CARD - NON-RESIDENTIAL (Form SO-15) is removed from the block folder (see below, under Tenant Control) and filed in a separate file drawer, by block and account number - behind guide cards, not in folders.

TENANT CONTROL

A card record is kept of all site tenants (including former owners who occupy space on the site and thus become tenants in their relation to BRA).

The SITE OCCUPANT RELOCATION RECORD cards (Form SO-14) for residential tenants are 8" x 6" cards. They are filed in a 2-drawer card file beside the AA's desk. To facilitate preparation of monthly reports, the file is separated into three sections: families; single-person households; and roomers. The cards are filed by block and by account number within the block, in each of these sections.

> NOTE: On GCP, roomers are not assigned individual account numbers. When the Form SO-14 is made up for roomers, the account number of the family or firm that operates the rooming house is put on the card of each roomer living in the house.

The form is typed up by the AA from data on the SITE OCCUPANT SURVEY (form SO-1). The AA fills in all subsequent data, to minimize loss and misfiling of records.

The form provides for the following information: eligibility for public housing; white, non-white; block number; account number; name and address; veteran status; family composition; current housing information; relocation requirements; relocation preferences; special relocation problems; name(s) of interviewer(s); date(s) of interview(s); comments. The reverse side of the card provides for: notices to family; relocation referrals; permanent relocation; temporary relocation; financial assistance granted to family; and relocation payment.

Under "Notices to Family" are included: informational statement (date given-stamped; effective date - of rent; extended to - not used; remarks); notice to terminate tenancy (date given - stamped; effective date - to terminate; extended to - not used; remarks).

Under "Relocation Referrals" are included 4 columns: address; account number; date; remarks. Space is provided for 5 referrals.

Under "Permanent Relocation" are included: accomplished by (family's initiative; LPA referral; eviction; other); address and date moved; type of housing (Federal low-rent public or other public; standard private rental; purchased; other; unknown).

Under "Temporary Relocation" are included: address; date moved; site transfer; sub-standard quarters off-site; other.

Under "Financial Assistance Granted to Family" are included; moving expense

(for on-site move); first month's rent (if hardship); other (such as storage charge in eviction); total.

Under "Relocation Payment" are included: amount (total paid, including property damage, if any); date paid.

When a tenant moves on-site (usually as a result of fire or other cause rendering his quarters uninhabitable), the card is stamped VACANT and date, and a new card is set up for this tenant with a new account number for the new location. If he has been moved into space that had been occupied at the time of taking and has since been vacated, the new tenant is given the former tenant's account number, to which is added a distinguishing suffix number (i.e., 10-1).

When an RA refers a family to a new dwelling, he enters the information on the official copy of the SITE OCCUPANT RELOCATION RECORD card (Form SO-14), under "Relocation Referrals."

When a residential tenant comes into the Office to file his CLAIM FOR RELOCATION PAYMENT (Form RC-1;HHFA-URA H-6140;see Residential Claims procedures), the Relocation Payment Claim Examiner (hereafter referred to as the RPCE) fills out Form SO-14 under "Permanent Relocation" (address and date moved); "Financial Assistance Granted to Family"; and "Relocation Payments."

If an RA discovers that a tenant has moved without coming first to file a Claim, he immediately notifies the AA and the RPCE. The RPCE fills in on the Form SO-14 whatever information the RA could give him, and also notifies the Cashier (see Residential Claims procedures).

The SITE OCCUPANT RECORD CARD - NON-RESIDENTIAL (Form SO-15), for business and professional tenants, is an 8½" x 11" card which is filed in folders set up by block (1 folder per block) and in order by account number within the folders. This form is typed up by the AA from data on the SURVEY OF NON-RESIDENTIAL SITE OCCUPANTS (Form SO-2).

The form provides for the following information: account number; block and parcel numbers; name, address and phone number of business; owner's name, home address and phone number; whether owner of building, renter or lessee; type of business; type of ownership; area occupied - sq. ft., floors, other locations; monthly rental; name, address and phone number of landlord or agent; personal property owned; services furnished by landlord - utilities, elevator, janitor, other; whether AC or DC current; remarks. The reverse side of the card provides for: <u>Relocation Requirements</u>: preferred new location; space requirements (floors,

sq. ft.); monthly rent; additional requirements (to be checked Yes or No) - parking facilities (if Yes, for how many cars), loading facilities, rail siding, others; whether would relocate in Project Area, if space available; memoranda.

NOTE: On GCP, relocation of business and professional tenants is carried on by a consultant and staff, on contract. That office, housed in the Site Office, has set up a duplicate file of the SITE OCCUPANT RECORD CARD - NON-RESIDENTIAL (Form SO-15) and of the STRUCTURE CONTROL CARD (Form SO-13) and is maintaining current control records of nonresidential tenants.

It is planned that eventually these records will be merged with the official records in the Office.

Meanwhile, the AA records changes of rent, if any, and date vacated on the official copies of these two forms in the Office.

The RPCE keeps the AA informed of the moving out of nonresidential tenants.

NOTE: On GCP, the RPCE formerly handled all claims for relocation payments. As a part of his records, he maintained a detailed analysis of all claims in process (see Residential Claims procedures).

Recently, he has been assigned to residential claims exclusively. However, he continues to maintain the analysis. For this purpose, he obtains current information from the files in the Business Relocation office and reports to the AA those who have vacated.

TRACING TENANTS

For each tenant that moves without leaving a new address, the AA types up Tracing Cards (Form SO-16), using blank 6" x 4" white cards. The name and address of the Site Office are stamped at the top of the card, followed by: account number; name; former address; space for new address; date moved.

A copy of this card is sent to each of the following: Post Office, gas company, Boston Edison Company and, sometimes, the telephone company. A covering letter (Form SO-17), signed by the Site Office Manager, accompanies the cards. All of these agencies cooperate by checking the cards against their records, filling in the new address if known and returning all cards to the AA.

NOTE: Not all of the site tenants have telephones, so cards are not regularly sent to the telephone company. Sometimes, the AA checks through the telephone book and calls the old number, to see if the operator will supply the new number.

On the Whitney Street project, if there were children in the family, the AA called the schools for information.

Usually, if the family cannot be located by these means, no further effort is made.

POST-INSPECTION OF NEW DWELLING UNITS

The third week of every month, the AA types up a list of the new addresses of all residential tenants relocated during the month and gives it to the Housing Inspector in the Family Relocation office. This list (MONTH) MOVE OUTS (Form SO-18) is typed on plain paper, not a form. The information covered includes: account number; name; old address; new address. The entries on the list are separated as to "Families" and "One-Person," and grouped by the section of the city to which they moved. They are listed in order by account number within location.

The list is made up in triplicate: 1 copy to the Housing Inspector; 1 to the Relocation Supervisor; and 1 filed in a folder labeled "Families Moved To Be Inspected," in the Office file.

By the end of the month, the Housing Inspector has completed the inspections. For each of the accounts inspected, he enters the information on the SITE OCCUPANT RELOCATION RECORD card (Form SO-14), under "Type of Housing" (see above, under Tenant Control).

The AA then posts these vacancies to the respective STRUCTURE CONTROL CARDS (Form SO-13; see above, under Structure Control). He then sorts the Site Occupant cards into the categories "Standard," "Substandard," etc., needed for the monthly report. After that report has been prepared (see below, under Reports on Relocation Progress), the cards are left in those categories and placed in a file to which only the AA and the Site Office Manager have access.

RENTS

The rents are set at the time the Survey Books are put together, and the amount of rent is shown on the Notification Letter (Form SO-5 and SO-6) sent to each site occupant (see above, under Initial Survey of Site Occupants and Notification of Site Occupants; also see Rent Collection procedures).

When tenants come in or call with questions or protests about their rent, they are referred to the AA.

If the tenant claims an error was made in setting the amount of his rent,

he is required to produce his last rent receipt from the former owner as proof of his claim. If an error is proved, a form letter known as the Rent Affidavit (Form SO-19) is made out for the tenant, showing the following: amount of rent he has been paying; length of time he has lived at his present address; and length of time he has been paying the stated rent. This form is filled out in triplicate: original for the Cashier; 1 copy for the tenant; and 1 filed in the account folder.

If it is a hardship case, the AA refers it to the Relocation Supervisor (see below, under Notice to Vacate (Nonpayment of Rent); also see Family Relocation procedures).

If the tenant claims a reduction in rent bacause the usual janitorial services are not being performed, the AA checks with the Maintenance office and takes the tenant in to talk with the Superintendent of Maintenance and clear it up (see Maintenance procedures).

If the tenant claims a reduction in rent because of loss of business or change in space occupied, the AA refers him to the Site Office Manager, who talks with the tenant and takes it up with the Real Estate ofdice.

If the tenant can produce a statement from his accountant showing a decline in his gross business from a comparable period during the previous year and can establish that this is resulting from the fact that the redevelopment project is in progress, a formula is applied to determine the amount of adjustment.

Some firms occupying large amounts of space (several floors) may reduce their space to one floor and request a corresponding adjustment in rent. In such cases, the amount is determined on the basis of the area occupied.

Recommendations for or against adjustment in these cases are worked out by the Site Office Manager and the Real Estate office. These are submitted to the Executive Director. Amounts of more than $100.00 must be approved by the Board.

The Real Estate office notifies the Site Office Manager by inter-office memorandum of the action taken by the Executive Director or the Board.

The form NOTICE OF CHANGE IN USE & OCCUPANCY CHARGE (Form SO-20) is used to notify the Cashier of the adjustment to be made (see Rent Collection procedures). This form provides for: name and address of tenant; apartment or floor number; project; old charge and period; new charge and period; effective date of change; prepared by; account, block and parcel numbers; code for reason; recommended by; approved by. It is a 2-part, carbonized form.

Then a letter (Form SO-21) is sent to the tenant, which contains a notice of the change in the use and occupancy charge, and a request to bring or send the letter in with his first payment under the new rate. The letter is made up in duplicate: original to the tenant; copy filed in the account folder.

> NOTE: On GCP, rent adjustments for loss of business and changes in space are handled by the Assistant Manager in charge of property management, who also signs the letter (Form SO-21).

The AA is notified of all adjustments in rent by receipt of a copy of the NOTICE OF CHANGE IN USE & OCCUPANY CHARGE (Form SO-20) from the Cashier (this is the copy for the Comptroller). All changes in rent are promptly posted to the respective Site Occupant cards (Forms SO-14 and SO-15) and the Notices are then sent to the Comptroller.

Many former owners who remain on site as tenants resent paying rent. Provision has been made for BRA to waive collection of rent until the time of final settlement, if the owner-tenant requests.

If the owner-tenant comes to the Site Office to request waiving of the rent payments, or discusses it with the RA, the AA prepares the form letter known as the Owner's Rent Waiver (Form SO-22). This is made up in triplicate and all copies are signed by the tenant. (If the owner-tenant did not come to the office, the RA takes the copies to him for signature.) The copies are distributed as follows: original to the Cashier; 1 to the tenant; 1 filed in the account folder.

The owner-tenant may prefer to have his attorneys deal directly with the General Counsel and handle it through correspondence (see Rent Collection procedures).

At the time a tenant files his CLAIM FOR RELOCATION PAYMENT (Form RC-1; see Residential Claims procedures), the RPCE checks with the Cashier to see whether there is an unpaid balance of rent due. If there is, the tenant is informed that the check for the relocation payment will be held until the rent is paid.

If the tenant moves without paying, and does not pay within 1 week from the time the Claim was filed, the AA sends a Dunning Letter (Form SO-23) from the General Counsel. This letter states that the account must be settled within 10 days or BRA will prosecute. The tenant is instructed to contact the Collection Coordinator (name and address given). The letter is made up in triplicate: original to the tenant; 1 copy to the Collection Coordinator; and 1 for the office file.

NOTICE TO VACATE (NONPAYMENT OF RENT)

Rent is payable on the first of every month. It is considered overdue if not paid by the 5th of the following month.

Between the 5th and the 10th of each month, the AA obtains from the Cashier a list of all accounts that are 2 months or more in arrears in rent.

A letter known as the 30-Day Warning Letter (Form SO-24) is sent to each delinquent residential tenant, by regular mail. A letter known as the 30-Day Notice to Vacate (Form SO-25) is sent to each delinquent nonresidential tenant, by registered mail, return receipt requested.

The Warning Letter contains the following: account number; date; statement concerning official taking and date; statement that tenant was notified of use and occupancy charge to be paid and given an Informational Statement outlining the conditions of occupancy; statement that payment has not been received and unless payment is made within 30 days, an eviction notice will be issued for non-payment. It is signed by the Site Office Manager.

The Notice to Vacate contains the following: date; quotation from the law concerning the Authority's rights to property taken in fee and specifying the address of the property occupied by the tenant; statement that tenant is notified to vacate the property within 30 days after receipt of this notice. It is signed by the Executive Director.

If a residential tenant does not pay after receiving the Warning Letter, the Notice to Vacate is sent, by registered mail, return receipt requested.

Once the Notice to Vacate has been received by a tenant, he remains on notice. Even if he pays the amount due and remains current for a while, if he ever falls behind again, the Notice need not be sent again.

When the Notice to Vacate is sent to a tenant, the Ledger Card (Form C-1; see Rent Collection procedures) is stamped 30-DAY VACATE. When the RETURN RECEIPT is received, the date the tenant signed is entered on the Ledger Card.

If any of the registered Notices come back unclaimed, the AA sends them to the Legal Department, with a covering inter-office memorandum, requesting that they be served by a Constable, to be sure the tenants are no longer at the addresses given. If any are located, the Legal Department lists them on an inter-office memorandum, giving the following information: account number; occupant; address; and acceptance date. This list is posted on the bulletin board in the Office.

The AA maintains a card file of all tenants who have received the Notice to Vacate, including those reached by the Constable. This file is set up on 6" x 4" blank white cards and kept in a file box on the desk for quick reference. When the memorandum is received from the Legal Department, these cards are brought up to date before it is posted on the bulletin board.

When payment is received from any of these tenants, the Cashier informs the Site Office Manager, who marks "Pd." in red beside the name on the list and notifies the General Counsel. At the same time, he informs the AA, who marks the card in the desk file.

When notified that a tenant has moved (see discussion above, under Tenant Control), the AA checks the card file to see whether it was one of those on notice. If so, the date vacated is entered on the card.

For residential tenants, if there is any question of inability to pay, by reason of income, health, or other cause, such hardship cases are referred to the Relocation Supervisor (see Family Relocation procedures). Each case is thoroughly studied and every effort is made to improve the tenant's situation before any recommendations are made for action in regard to nonpayment of rent.

Weekly, in time for the meeting of the Board on Wednesday, the AA prepares the SITE OCCUPANT REPORT (Form SO-26), using the same form for residential and nonresidential tenants. Preparing an individual form for each tenant, he reports all residential tenants who are still delinquent 60 days after receipt of the Warning Letter and/or Notice to Vacate, and all nonresidential tenants delinquent 30 days after receipt of the Notice.

The form provides for: date; account number; name and address of tenant; type of business (if commercial); number in family and ages (if residential); amount of rent due; reason given for nonpayment; number of months delinquent in rent; date of last contact; number of contacts made; date 30-day Notice to Vacate signed; narrative. The form is signed by the Site Office Manager.

NOTE: On GCP, the title "Manager" was used instead of "Site Office Manager."

Information for completion of the "Reason Given" and "Narrative" sections of the Report is obtained from the Collection Coordinator, who comes to the Site Office each week to discuss the delinquent cases with the Site Office Manager. Since he has attempted to collect from these accounts, he knows what reasons they give as to why they cannot or will not pay. Also, the RA's assigned to the respective cases supply such information as they have. In cases of genuine

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

hardship, where the staff has been unable to overcome all the problems involved, a careful report of the situation is made.

The Report (Form SO-26) is made in 9 copies: 5 for the Board (1 for each member); 1 for the Executive Director; 1 for the Development Administrator; 1 for the account folder; and 1 filed by account number in one folder in the Office file.

If the Board decides to evict, this action is carried on by the Legal Department. The AA is notified of the decision by inter-office memorandum. Working with the Cashier, he then stamps the Ledger Card for each such tenant BOARD ACTION and date, and also marks the card in his desk file.

> NOTE: On GCP, it has been the Board's practice not to evict hardship cases. Instead, the Site Office Manager was instructed to accept such partial payments as the tenant might be able to make, or permit him to continue delinquent until he could be relocated in the normal manner.
>
> At that time, the payment of any balance due was waived (see Rent Collection procedures).

Upon notification that an evicted tenant has actually moved from the site, the AA pulls the card from the desk file; writes in the date moved; types an inter-office memorandum for the Legal Department; and returns the card to the file.

NOTICE TO VACATE (PRIORITY AREAS)

Priority areas are determined by the Development Administrator. The Site Office is notified by means of maps showing staging areas and by periodic notifications in the form of mimeographed sheets supplied by the Project Director, showing deadline dates by block, by building address.

Official notice is sent to all tenants in the area (residential and nonresidential) by the AA, using the same 30-Day Notice to Vacate (Form SO-25) described above under Notice to Vacate (Nonpayment of Rent). It is sent by registered mail, return receipt requested, and the same procedures are followed, including service by a Constable, where required.

REPORTS ON RELOCATION PROGRESS

Two reports are regularly made concerning progress in relocation, one monthly to the URA and one weekly to the BRA.

The REPORT OF RELOCATION PROGRESS (Form SO-27; HHFA-URA H-666) is due in the New York Regional Office of URA by the 10th of each month. This is a cumulative record of relocation data concerning families, individual households and business concerns, together with a summary of relocation payments.

A draft of the report is prepared first in pencil. The AA fills in pages 1 to 3 from data on the SITE OCCUPANT RELOCATION RECORD (Form SO-14), supplemented by inspection and referral information supplied by the Relocation Supervisor. The signature of the authorized officer, on page 4, is that of the Site Office Manager.

The report is typed up in 8 copies. When pages 1 to 3 have been completed and the signature has been affixed to page 4, all copies are sent to the Comptroller, who completes page 4 (concerning relocation payments) and distributes the Report as follows: 2 copies to the Regional Office; 1 to the local URA representative; 1 to the Executive Director; 1 to the Development Administrator; 1 to the Project Director; 1 retained by the Comptroller; and 1 returned to the Office, where it is filed in a folder, latest copy on top.

Weekly, in time for the Board meeting, the WEEKLY REPORT ON RELOCATION (Form SO-28) is used to report on relocation from both priority areas and the total project area. The form provides for the following information: Date (week ending); Priority Area: 5 columns - demolition contract area number; number of non-residential October 25, 1961; number of non-residential previous report; number vacated this week; number remaining. Totals for columns 2-5. (Residential tenants relocated from any of the areas are indicated by a note beside the area number, in a separate line.) Total Project Area: 4 categories in the first column - number of families October 25, 1961; number of individual families; number of roomers; number of non-residential. 3 other columns - number on previous report; vacated this week; remaining. Total for columns 2-4.

This Report is made up in 10 copies: 5 to the Board (1 for each member); 1 to the Executive Director; 1 to the Development Administrator; 1 to the Project Director; 1 to the Site Office Manager; 1 for the Office, where it is filed in a folder, latest on top.

A monthly Memorandum of Relocation Distribution (Form SO-29) is sent to the Executive Director by the Site Office Manager. Data for this memorandum are furnished by the RPCE, from analysis of the Claims filed by residential tenants. The report shows the number of tenants, and percent of total, relocated to specific sections of the city and suburbs, or out of state, for families and for one-

person families; also a summary of the number at time of taking, number moved and number active, for families, one-person families and roomers.

RESPONSIBILITY FOR RELOCATION

All tenants are entitled to one relocation payment - even if self-relocated into substandard housing. None receives more than one relocation payment, except in the case of an on-site move (see above, under Tenant Control). There is a 6-month limit on filing the claim for payment.

BRA is responsible for relocated families (excluding one-person families and roomers) for 2 years after they have moved from the site.

If a family that has beeen relocated decides, within 2 years, that it wants to get into public housing, it is entitled to come to BRA for help. (BRA relocatees receive priority in placement in public housing; see Family Relocation procedures.)

If a family has self-relocated into substandard housing, a letter (Form SO-30) containing a reply postal card (Form SO-31) is sent out, directly after the monthly inspection of new dwellings. This letter states BRA's obligation to assist all displaced families to find standard housing.

The letter is made up in triplicate: original sent to the relocatee; 1 to the Housing Inspector; 1 filed in a folder labeled "Assistance to Families in Substandard Housing," in order by account number.

When the return postal cards are received, the Relocation Supervisor is notified (see Family Relocation procedures). The cards are stapled to the respective letters and returned to the folder.

If the Relocation Supervisor reports that offers of further assistance were refused and he considers the case closed, the letter and card are removed from the folder and filed in the account folder. The family may, however, return for assistance at any time within the 2-year time limit.

APPENDIX

HOTEL AND ROOMING HOUSE SURVEY

It is BRA policy, although not a legal requirement, to help permanent roomers (not transients).

NOTE: As this decision was made after the initial survey (before taking) had been compiled on GCP, a separate survey was made.

Taking a list of all rooming houses discovered in the initial survey, the RA assigned to roomers conducted this additional survey, with the assistance of another staff member.

The procedure below is written in terms of what would be done at another site.

In the initial survey of site occupants, the form HOTEL, ROOMING HOUSE SURVEY (Form SO-1A) is used, to supplement the SITE OCCUPANT SURVEY (Form SO-1) used for families and one-person households and the SURVEY OF NON-RESIDENTIAL SITE OCCUPANTS (Form SO-2) used for business and professional tenants.

From SO-1A provides for the following information: date of interview; name, address and floor; number of rooms now and number needed; block and parcel numbers; duration of present tenancy - if less than 5 years, information about past 5 years; new location preference; rent - contract rent, facilities and utilities, gross rent; characteristics - number of persons in this unit, sex and age, race, citizenship and veteran status, income, type and location of job, transportation information; housing - type wanted, facilities and services important to have in or near dwelling; plans for moving; how BRA can help; additional comments; dates of contacts; type of referral; date of disposition; new address.

NOTE: This form, as used on GCP, now combines the functions of survey sheet and work sheet (see last 4 items). It requires modification before it is used in the initial survey on another site.

FORMS - SITE OFFICE RELOCATION RECORDS

MSA NO.	TITLE OR DESCRIPTION[1]
SO-1	SITE OCCUPANT SURVEY
SO-1A	HOTEL, ROOMING HOUSE SURVEY
SO-2	SURVEY OF NON-RESIDENTIAL SITE OCCUPANTS
SO-3	List of Instructions
SO-4	Description of Structures
SO-5	Notification Letter (general)
SO-6	Notification Letter (First Realty Company)
SO-7	INFORMATIONAL STATEMENT TO RESIDENTIAL SITE OCCUPANTS
SO-8	INFORMATIONAL STATEMENT TO NON-RESIDENTIAL SITE OCCUPANTS
SO-9	RETURN RECEIPT (POD Form 3811)
SO-10	Window Envelope
SO-11	APPLICATION FOR REGISTRATION AND CERTIFICATE OF DECLARED VALUE OF MATTER SUBECT TO POSTAL SURCHARGE (POD Form 3877)
SO-12	REFERENCE SHEET
SO-13	STRUCTURE CONTROL CARD
SO-14	SITE OCCUPANT RELOCATION RECORD
SO-15	SITE OCCUPANT RECORD CARD - NON-RESIDENTIAL
SO-16	Tracing Card
SO-17	Letter transmitting Tracing Cards
SO-18	(MONTH) MOVE OUTS TO BE INSPECTED
SO-19	Rent Affidavit
SO-20	NOTICE OF CHANGE IN USE & OCCUPANCY CHARGE
SO-21	Letter concerning adjustment in use and occupancy charge
SO-22	Owner's Rent Waiver
SO-23	Dunning Letter
SO-24	30-day Warning Letter
SO-25	30-day Notice to Vacate
SO-26	SITE OCCUPANT REPORT
SO-27	REPORT OF RELOCATION PROGRESS (HHFA-URA H-666)
SO-28	WEEKLY REPORT ON RELOCATION
SO-29	Memorandum of Relocation Distribution
SO-30	Letter to self-relocatees in substandard housing
SO-31	Postal card enclosure for reply
	- - - - -
C-1	Ledger Card
C-3	Rent Receipts
F-6	Questionnaire
F-13	Hardship Reports
RC-1	CLAIM FOR RELOCATION PAYMENT (HHFA-URA H-6140)

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[1] If a title appears on a form, this is written in all capital letters. If the form is known by a definite name, even though this is not printed on the form, it is written with the first letter of each word capitalized. A general descriptive term for the form is not capitalized.

The forms listed below the broken line are originated in other parts of the Site Office, but are also involved in some measure in the work of the Office.

CURRENT PROCEDURES
FOR
FAMILY RELOCATION

Government Center, Boston

The following procedures are those being followed at the Government Center Project.

They are reported in an informal, narrative style, reflecting the fact that they were developed through interviews with Site Office personnel. They provided the basis for the Recommendations set forth in Part III of the report, "A Comprehensive Family Relocation Program for the Boston Redevelopment Authority."

MANAGEMENT SERVICES ASSOCIATES, INC. . NEW YORK, N. Y.

CURRENT PROCEDURES

FAMILY RELOCATION

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CURRENT PROCEDURES

FAMILY RELOCATION

ASSIGNMENT OF CASES

The relocation Supervisor (hereafter referred to as the Supervisor) in charge of the Family Relocation section screens the original survey sheet (SITE OCCUPANT SURVEY (Form SO-1A); see Site Office Relocation Records procedures) and assigns the residential tenants among his staff.

Families are assigned to the Relocation Assistants (hereafter referred to as RA's) on the basis of blocks, taking into account the density of population.

Roomers are assigned exclusively to one RA, who also does room-finding. Another RA has the office title of Housing Inspector and is responsible for inspection and home-finding. Another RA does some inspecting, as needed. The Supervisor assists in home-finding.

> NOTE: On GCP, public housing applications are handled by the administrative assistant in the Office (hereafter referred to as the AA); the official title for this position is Relocation Payment Clerk - Relocation Assistant.
>
> Throughout these procedures, the staff of the Site Office Manager is referred to collectively as the Office.

A form known as the Assignment Sheet (Form F-1)[1] is used in making the assignments of cases to the respective RA's. It provides for: block number; columns for account number, name and address of tenants, family composition, remarks. The "Remarks" column is wide, to permit the keeping of working notes on the sheets. The form is made up in triplicate: 1 copy for the RA; 1 for the Site Office Manager; and 1 for the Supervisor.

The Supervisor's sets of Assignment Sheets are kept up to date as families are relocated. At intervals, as progress warrants, he reviews the respective

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[1] The number in parentheses (F-1) is the first of a series of numbers assigned by MSA for identification of all forms used by the Family Relocation office. Where a title is printed on the form, it is written here in all capital letters. The legend of rubber stamps also is written in all capital letters.

case lists and reassigns cases among the RA's to bring the work loads into balance again. Revised sets of Assignment Sheets are then issued, eliminating the names of those relocated and reflecting the new assignments. The revised Sheets are made up and distributed as above.

As a working file, the Supervisor has a complete set of SITE OCCUPANT RELOCATION cards (Form SO-14), identical in information with the cards in the Office file (see Site Office Relocation Records procedures). His file is set up in two sections - by family and by individual household - and arranged alphabetically within the sections. The cards are kept up to date by his staff.

HOME-FINDING

The Housing Inspector and the Supervisor are responsible for home-finding. They contact real estate agencies and, twice a week, receive the free listings of the Multiple Listing Service of the Greater Boston Real Estate Board. They also get information from the Veterans Administration Management Division and the Federal Housing Administration. They are familiar with, and when appropriate recommend purchase under, Section 221d3. The Supervisor places ads in Sunday editions of the local papers, as needs warrant. While making his inspection rounds, the Housing Inspector keeps watch for vacancies and personally contacts the real estate agencies in the area.

A file of information concerning real estate brokers is maintained, using a 5" x 3" card (Form F-2). The form provides for: name, address and phone number; date; remarks. Under "Remarks" are entered comments on the specific types of services each offers.

Once or twice a week, the Inspector prepares a list of homes for sale that are reasonable in price and up to standards; and of apartments inspected to date. A copy is given to each RA. They are informed that the list of houses for sale is only partial and that interested tenants are to be instructed to contact the Inspector.

A card is made up for each available apartment or property. Two forms are used for this purpose. Both provide for recording inspection data and referral information.

The VACANCY SURVEY CARD (Form F-3) is used for recording data about apartments for rent. This form provides for: date; listed by; address; type of house; number of rooms and bedrooms; rent; essential information about heat, utilities, bathroom facilities, means of egress, condition of unit, etc.; restrictions and

requirements; name and phone number of landlord or agent; remarks. The reverse side of the card provides room for recording four referrals, showing: name and address of family; date; action taken; name of RA making the referral.

The SALES LISTING CARD (Form F-4) is used for recording data about properties for sale. This form provides for: listing date; listed by; address of property; sales price; type of house; number of rooms; number of baths; size of lot; assessment or annual tax; income, if any; distance to transportation, stores, school; special features; name, address and phone number of owner or agent; instructions for showing; other information. The reverse side of the card provides for the same referral information as on Form F-3.

The cards are kept in a file accessible to all the RA's. The file is set up in two sections: "Vacant" and "Not Vacant." From time to time, the clerk or any of the RA's temporarily unable to be in the field will run through the "Vacant" cards and call to see whether the units still are available.

HOUSING INSPECTION

Pre-Inspection

It is the policy of the BRA to refer tenants only to dwelling units that have been inspected before referral and found to meet the approved standards.

The Housing Inspector inspects all dwellings listed and records the information on the appropriate VACANCY SURVEY CARD or SALES LISTING CARD (Forms F-3 and F-4).

Post-Inspection

It is BRA policy to inspect each dwelling into which displaced families are relocated, whether referred by BRA or self-relocated. An independent post-inspection is also made by a representative of the Regional Office of URA.

Monthly, the Supervisor receives from the AA a list entitled (MONTH) MOVE OUTS TO BE INSPECTED (Form SO-18; see Site Office Relocation Records procedures). He checks this list to eliminate any new addresses that cannot feasibly be visited, i.e., beyond a 20-mile radius from the Site Office. He then gives the list to the Inspector, who visits each dwelling.

Using the RELOCATION INSPECTION SHEET (Form F-5), the Inspector records both housing information and the reactions of the relocated family. The form provides

for: name; account number; how relocated; new and old addresses; whether tenant or owner; present and former rents; number of rooms; number of bedrooms; whether furnished; type of heat and who supplies it; a series of questions for Yes-No answers (private toilet and bath, hot and cold water, all conveniences in kitchen, proper lighting, two means of egress, structurally sound, environment suitable, adequate sanitary conditions); whether the unit is standard; Inspector's comments; family's comments (how they found the apartment, whether pleased with the move, whether they have received their moving allowance); if substandard, will they accept LPA assistance to move to a better unit; date; Inspector's name.

If the family states definitely that it does not want assistance in moving from substandard quarters, the Inspector records the comments in detail on the back of the form and endeavors to obtain a signature.

After completing the inspections, the Inspector gets from the AA the SITE OCCUPANT RELOCATION RECORD (Form SO-14; see Site Office Relocation Records procedures) for each family visited. He fills in Item 7, "Permanent Relocation," parts a and c, having to do with how relocation was accomplished and type of housing, respectively, and returns the cards to the AA. He makes the same notations on the Supervisor's working file of Form SO-14.

The completed RELOCATION INSPECTION SHEETS (Form F-5) are shown to the AA, but returned to the Family Relocation office to hold for statistical purposes. Later, they will be filed in the respective individual tenant account folders in the Office.

> NOTE: A new procedure is being tried on GCP (as of April, 1962) for handling inspection of new dwelling units. As soon as a self-relocated family comes in to file a Claim for moving expenses (see Residential Claims procedures), the Relocation Payments Claim Examiner notifies the Supervisor. If at all possible (depending on how soon after filing the family is going to move), an Inspector visits and inspects the new dwelling unit, prior to the move.
>
> If he finds it substandard, he reports to the RA assigned to the tenant and the latter tries to persuade the family not to move into the substandard quarters, offering instead a standard unit as near the same size and price as possible.
>
> If this approach proves successful, it will be continued.

Directly after the Inspector has completed the monthly inspections and submitted the data to the AA, a letter (Form SO-30) is sent by the AA to each family that has self-relocated into a substandard dwelling (see Site Office Relocation

Records procedures, under Responsibility for Relocation). After the return postal cards (Form SO-31) have been received by the AA, he notifies the Supervisor. Whether or not the family indicates a desire for assistance in obtaining standard housing, the RA assigned to it visits with a list of referrals and makes a further attempt to persuade the family to move into a standard dwelling. If the family does want help, the same efforts are made as for any of the tenants still on the site.

RELOCATION SERVICES

1. Families and Roomers

Once he has received his set of Assignment Sheets (Form F-1), each RA is expected to visit each of his families at least once a week. His services to the family include: learning about their preferences and problems in relation to moving to a new location; selecting and offering them new dwellings most nearly answering their needs; taking them around in his car to look at a referral, when necessary; and referring any serious problems to the Supervisor (see below, under Problem Families).

A Questionnaire (Form F-6) is used to obtain information on the specific relocation problems and intentions of each family. This is used once and filed in the account folder. The form covers such things as: tenant's relocation plans; efforts on own behalf; when desiring to move; locations preferred; minimum number of rooms; maximum rent; interest in public housing; interest in buying; type of house; amount of down payment; remarks.

If there is no one at home when the RA calls, he leaves a small form Notice of Visit (Form F-7). This provides for: occupant's name; date; name of RA; request to contact the RA at (address filled in) between 9 A.M. and 5 P.M. or telephone him at (number filled in) as soon as possible.

When a family is ready to go to see a referral, an Introduction Letter is made up. There are three form letters, one for renters (Form F-8), one for buyers (Form F-9) and one for roomers (Form F-10). All of the letters provide for this basic information: name of owner, agent, or superintendent; name and present address of family; address of vacancy; a request that the Supervisor be notified if the family is acceptable and rents (or buys) the dwelling; a statement at the bottom in which the family agrees to look at the above-mentioned dwelling, without obligation; and provision for the signature of the RA.

In addition, the letter for the renters contains: floor; apartment number; number of rooms; rent per month; and details concerning utilities and standard requirements met. The letter for buyers includes: type of dwelling; number of rooms; land area; income, if any; assessment; and sales price. The letter for roomers includes: floor; price per week; and services provided.

Each letter is made up in duplicate: original to the tenant; the copy to the AA for the account folder.

The letters serve a dual purpose: they prove that the RA made the referral; and signing the agreement helps to give the tenant some sense of responsibility about actually going to see the vacancy.

Each time he makes a referral, the RA gets from the AA the tenant's SITE OCCUPANT RELOCATION RECORD (Form SO-14). On the back of the card, under item 6, "Relocation Referrals," he fills in the following: address; account number; date; remarks; and returns the card to the AA. He makes the same notations on the Supervisor's working file of SITE OCCUPANT RELOCATION RECORD cards (Form SO-14).

A brief account of what took place during each contact with a tenant (whether a visit or a phone call) is reported on an individual REFERENCE SHEET (Form SO-12; see Site Office Relocation Records procedures) and given to the AA to be filed in the respective tenant account folder.

2. Problem Families

Should RA's encounter serious problems among the families they visit, they refer these families to the Social Service Unit (hereafter referred to as the SSU). This is done by using REFERRAL TO SOCIAL SERVICE UNIT (Form F-11). This form provides for: date; name, address and account number of family; block and parcel number; reason for referral; and name of RA. For completion later: date case assigned; Social Worker's name. This form is made up in triplicate: 1 copy for the SSU; 1 for the Supervisor; and 1 retained by the RA. The Supervisor's copy may be filed in the tenant's account folder, after action is taken.

Weekly conferences are held between the SSU and Relocation staffs, for reporting of action on open cases and for referral of new cases.

The SSU office writes up each referral as it is received and sends a copy of this write-up to the Office, where it is filed in a special confidential folder, with a cross-reference sheet filed in the respective account folder (see Site Office Relocation Records procedures).

NOTE: On GCP, the Social Service Unit is not a part of the Site Office staff, but a contractor (UCS) providing social work services to families referred to it by the Family Relocation staff.

The Unit occupies quarters in the Site Office.

To avoid duplication, the official records on the families receiving service are maintained by the SSU, but are available to the Relocation staff.

The basic case record is the SOCIAL SERVICE UNIT SURVEY QUESTIONNAIRE (Form F-12). Individual case folders are maintained in a confidential file. Standard case reporting is carried out.

The AA notifies the Supervisor whenever a family claims inability to pay rent because of hardship (income, health, or other problems). If the family is not already being carried as a problem family, the Supervisor requests the SSU to investigate the circumstances and report on the validity of the family's claim. Every effort is made to solve the family's problems.

The SSU reports to the Supervisor on the situation the Social Worker has found and what has been done about. Based on this information, a report called the Hardship Report (Form F-13) is prepared and sent to the AA, who incorporates it into his report to the Board (SITE OCCUPANT REPORT (Form SO-26; see Site Office Relocation Records procedures). Form F-13 is not a printed form, but follows a set style. It is made up in triplicate: 1 copy for the AA; 1 for the Supervisor; and 1 for the SSU. It is a confidential report and receives confidential treatment in the Office.

3. Public Housing

BRA relocatees receive priority in placement in public housing. RA's are instructed to advocate public housing to eligible families, as they work with them. If any interest is shown, the family is told to come to the Site Office and talk to the AA, who is in charge of applications for public housing (see Note on page 1).

The AA has a list of all projects; a schedule of income limits; information about age limits; and supplies of the application forms for the two kinds of public housing, Federal and State. The Federally aided projects are for families of low income, either veteran or nonveteran, but mostly nonveteran. State-aided projects are for veterans' families of low income.

The AA assists the tenant in completing the front of the appropriate form (Federal or State). The two forms call for substantially the same information

concerning: family composition; employment; other income or assets; debts; present and previous addresses; previous tenancy of family or relatives in public housing; court record of family; ownership of motor vehicle; recommendations. Only 1 copy of each form is made up.

> NOTE: In the case of an elderly or infirm person who cannot come into the office, the form is given either to the RA assigned to that family or to a friend of the family, with full instructions as to how it should be filled in, so that it can be completed in the home.

When filling out the application, the AA verifies the necessary supporting information (income source; citizenship), thus eliminating the delay that would occur if the Boston Housing Authority were to do this by mail. He also advises the applicant, if employed, to obtain a letter from his firm stating the amount of his income, and to bring it to the Relocation office. The AA sends this to BHA.

As soon as the application has been filled in (without waiting for the letter about income), he sends it to the main office of BHA, which handles applications for both types of public housing.

When the application has had time to reach BHA, the AA calls the Chairman's office, to get an assignment of an apartment. Then the application is sent to 141 Milk Street (the BHA office that keeps all records of all applications). After 1 week, the AA calls the Milk Street office to learn whether the application has been sent to a project. If so, he calls the project and makes an appointment for the applicant to see the apartment. Then he tells the RA assigned to the family, who arranges for the applicant to keep the appointment.

If the applicant does not accept the apartment, the AA notifies the housing project manager, who returns the application to the main office of BHA, where it is held until the applicant is ready to consider another referral. At such time, the process is repeated.

BRA is legally required to make only two referrals to public housing; but, in practice, makes more if warranted. BHA has some 5-room apartments. Sometimes, if rehousing is urgent, a large family will elect to crowd into a smaller apartment, while waiting for a larger one to become vacant, instead of waiting for a large one in the first place.

The AA keeps a running chronological record of all applications for public

housing. This is kept in a permanently bound notebook and includes: name; date filed; number of rooms required; location desired.

When an applicant is definitely located in a public housing apartment, the AA marks "Housed" beside the original entry in the notebook. He also pulls the SITE OCCUPANT RELOCATION CARD (Form SO-14; see Site Office Relocation Records procedures) and fills in the appropriate blank under item 7c. He also notifies the Supervisor, who has the same notation made on the card in his working file of Form SO-14.

STATISTICS

The Housing Inspector keeps a record of all his inspections. As a part of the routine post-inspection of dwellings, he obtains information as to the new rent.

Each month, the Supervisor supplies information to the AA for incorporation into page 3 of the REPORT OF RELOCATION PROGRESS (HHFA-URA H-666, Form SO-27; see site Office Relocation Records procedures). This information includes: inspections made during month (prospective private rental, prospective sales, private rental to which site occupants have moved and sales housing to which site occupants have moved); referrals made during the month (public housing, private rental housing and sales housing); standard private rental units available for referral on last day of month.

RESPONSIBILITY FOR RELOCATION

This subject is covered in detail in the Site Office Relocation Records procedures. BRA is responsible, for 2 years after they have moved, for families which self-relocate into substandard housing and for any relocated families which decide they would like to move into public housing. (This resopnsibility does not extend to one-person households or roomers.)

There is no limit to the number of referrals the RA's are required to make - or do make - in their effort to accomplish effective relocation.

CLOSING OF CASES

A case is not considered closed until the family has been relocated into suitable and satisfactory standard housing.

The exceptions are those families which have self-relocated into substandard

housing and refuse all offers of assistance. Once such families have indicated unequivocally that they do not want to be helped, they are left alone, with the understanding that they are entitled to change their minds at any time within the succeeding 2 years.

FORMS - FAMILY RELOCATION

MSA NO.	TITLE OR DESCRIPTION[1]
F-1	Assignment Sheet
F-2	Real estate source card
F-3	VACANCY SURVEY CARD
F-4	SALES LISTING CARD
F-5	RELOCATION INSPECTION SHEET
F-6	Questionnaire
F-7	Notice of Visit
F-8	Introduction Letter (renter)
F-9	Introduction Letter (buyer)
F-10	Introduction Letter (roomer)
F-11	REFERRAL TO SOCIAL SERVICE UNIT
F-12	SOCIAL SERVICE RELOCATION QUESTIONNAIRE
F-13	Hardship Report

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SO-1	SITE OCCUPANT SURVEY
SO-1A	HOTEL, ROOMING HOUSE SURVEY
SO-12	REFERENCE SHEET
SO-14	SITE OCCUPANT RELOCATION RECORD
SO-18	(MONTH) MOVE OUTS TO BE INSPECTED
SO-27	REPORT OF RELOCATION PROGRESS (HHFA-URA H-666)
SO-30	Letter to self-relocatees in substandard housing
SO-31	Postal card enclosure for reply

[1] If a title appears on a form, this is written in all capital letters. If the form is known by a definite name, even though this is not printed on the form, it is written with the first letter of each word capitalized. A general descriptive term for the form is not capitalized.

The forms listed below the broken line are originated in other parts of the Site Office, but are also involved in some measure in the work of the Relocation staff.

[illegible]

[illegible]

[illegible]

CURRENT PROCEDURES
FOR
RESIDENTIAL CLAIMS

Government Center, Boston

The following procedures are those being followed at the Government Center Project.

They are reported in an informal, narrative style, reflecting the fact that they were developed through interviews with Site Office personnel. They provided the basis for the Recommendations set forth in Part III of the report, "A Comprehensive Family Relocation Program for the Boston Redevelopment Authority."

CURRENT PROCEDURES

RESIDENTIAL CLAIMS

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CURRENT PROCEDURES

RESIDENTIAL CLAIMS

The processing of residential claims is the responsibility of the Relocation Payment Claim Examiner (hereafter referred to as the RPCE), working in the office of the Site Office Manager.

> NOTE: Prior to April 15, 1962, all claims (residential and non-residential) were handled by the Business Relocation division at the Site Office. As of that date, they were separated and the residential claims processing was transferred to the jurisdiction of the Site Office Manager. The following procedures reflect the information obtained in an interview with the RPCE on April 24, 1962.

RELOCATION PAYMENT PROVISIONS

All residential site tenants are allowed one relocation payment (which includes both moving expenses and property loss, if any), not to exceed $200.00. The tenant is entitled to receive this payment even if self-relocated into substandard housing. However, if he later accepts BRA assistance and is relocated into standard housing, he is not entitled to another relocation payment. The only situation in which two payments of moving expenses may be made to a tenant is in the case of an on-site move (see Site Office Relocation Records procedures, under Tenant Control).

There are two prerequisites to receiving the relocation payment:

1. Unless confined to his home by an infirmity, the tenant must come to the Site Office to file a claim.

   NOTE: This is done in order to have a final opportunity to try to persuade self-relocating tenants to permit a pre-inspection of their new quarters, and, if substandard, to try to prevail upon them not to move there.

2. The rent must be paid in full to the date of moving.

The tenant may select one of three methods of payment:

1. Accepting the fixed amount payment.

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

2. Paying the mover and presenting the receipted bill to BRA for reimbursement, together with an executed copy of the form letter to accompany the mover's bill (Form RC-4; see below under Filing of Claims).

3. Having the mover present his bill directly to BRA for payment.

A schedule of Fixed Amount Payments for Moving is displayed prominently on the walls of the Site Office. The amounts allowed are based on the number of rooms full of furniture to be moved. In addition, there are flat allowances for persons with no furniture, to cover transfer of personal effects by taxi.

"Property loss" covers not only damage to or actual loss of items in moving. It includes such things as the financial loss incurred in selling a stove or other piece of furniture not wanted in the new location, and in being unable to re-use linoleum, venetian blinds, or curtains.

Movers are entitled to the rates per hour set by the Department of Public Utilities.

FILING OF CLAIMS

When the tenant comes in to file his claim, the RPCE fills out the form CLAIM FOR RELOCATION PAYMENT (Form RC-1;[1] HHFA-URA H-6140); the VACATE NOTICE (Form RC-2); and an identification card for his working file.

> NOTE: On GCP, the Claim form may also be filled out by the administrative assistant in the Office or by the Assistant Manager in charge of property management.
>
> The official title of the administrative assistant (hereafter called the AA) is Relocation Payment Clerk - Relocation Assistant. Throughout all of these procedures for a Site Office, the staff of the Site Office Manager is referred to collectively as the Office.

The form CLAIM FOR RELOCATION PAYMENT (RC-1) is used for presenting the claims of all relocatees, but different parts of the form are completed for different methods of payment.

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[1] The number in parentheses (RC-1) is the first of a series of numbers assigned by MSA for identification of all forms used in the processing of Residential Claims. Where a title is printed in the form, it is written here in all capital letters. The legend of rubber stamps also is written in all capital letters.

The face of the form provides for the following information: name and address of LPA; Project name and address; items 1 - 6: claimant's name; date(s) of move; old address (including apartment, floor or room number; ownership of furniture; number of rooms occupied); new address (including apartment, floor or room number); type of payment claimed; total claim; items 7 - 11: name, address and telephone number of moving company (or person); method of payment, moving bill; amount of actual cost and/or loss (cost of moving; direct loss of property claimed); item 12: certificate of accuracy of bills and information submitted, with date and signature of claimant.

The reverse side of the form provides for the following information: Statement of claim for direct loss of property: 6 columns - description of property; basis for amount claimed; fair market value (for continued use at present location; delivered to another location); amount claimed; amount approved (for LPA use). To be completed by LPA: Certificate of examination, approval and authorization of payment, with authorized signature. Section for filling in the amounts of: reimbursement for actual moving expense; reimbursement for actual direct loss of property; and fixed payment. Section for payment(s) made in settlement of claim: provision for entering check number and amount for three checks.

Items 1 through 6 are filled out for all claimants. Those choosing the fixed payment then complete only item 12, in addition. For all other claimants, items 7 through 12 are completed.

In the lower left corner of the reverse side of the form, the RPCE fills in the amount of "Reimbursement for actual moving expenses" from the bill; or the third item, "Fixed payment" from the schedule. The second item, "Reimbursement for actual direct loss of property," is based on the detailed schedule in the upper part of the sheet. He also fills in the date. The "Authorized signature" is that of the Site Office Manager.

> NOTE: On GCP, in the absence of the Site Office Manager, this form may be reviewed and signed by the Assistant Manager in charge of property management.

Only one copy of this form is made up; no copies are made for the file. This copy is sent to the Comptroller, who fills in the remaining section on the reverse side, "Payment(s) made in settlement of claim." (See below, under Transmitting Claims.)

The RPCE advises the tenant concerning the amount of fixed payment to which

he is entitled; discusses the rates to which the movers are entitled; and explains the requirement that the rent be paid in full before the payment can be made. He also attempts to learn the exact date when the tenant intends to move.

If the tenant decides that he prefers to present the mover's bill, instead of taking the fixed payment, the RPCE advises him to keep close check on the exact time the movers start and finish; to be sure the bill of lading is correct before he signs it; and, if the bill is in excess of the fixed payment, not to pay the movers, but to mail or bring the bill in to the Site Office, instead. He gives the tenant a form letter (Form RC-3), to be signed by the tenant and attached to the bill. The letter contains the identification of the Project and a one-sentence statement that the undersigned represents and warrants that the attached bill is true and correct. There is a line for the tenant's signature. Only one copy of this letter is signed. It becomes a part of the supporting documentation for the Claim and protects BRA in case of any legal action.

When a tenant mails or brings in a mover's bill, or the mover mails it in, the RPCE asks the RA to check it, in order to verify that the move has actually been made.

When he starts to fill out the Claim, the RPCE checks with the Cashier who looks up the tenant's account number in the cross-reference file in the Cashier's office and also looks at the Ledger Card (Form C-1; see Rent Collection procedures) to detemine whether the rent has been paid up to date.

While filling out the Claim form, the RPCE also completes part of the VACATE NOTICE (Form RC-2), which is the formal notification to the Cashier that the tenant has moved and should be removed from the Rent Roll (see Rent Collection procedures). The upper part of the form provides for the following information: name, account number and address of tenant (including apartment number, if any); date; date rent ends; amount of rent per period; prepared by; Project number. The lower portion of the form is for use by the Cashier (see Rent Collection procedure). Only one copy of this form is made up. It is given to the Cashier as soon as the RPCE is certain that the tenant has actually moved (see below).

Claimants for direct reimbursement of property loss are required to provide information to complete the statment on the reverse side of the form, submitting supporting documents as evidence of value.

If claiming a loss of linoleum, venetian blinds, or curtains, the tenant must submit bills for new items. The RPCE then uses the property loss table furnished by URA, which shows the applicable allowances. To the extent the

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[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

allowable losses can be paid within the $200.00 ceiling, the RPCE fills in the approved amount for the LPA. The Site Office Manager reviews the completed Claim to make certain it is properly documented before he approves it.

The RPCE obtains from the RA verification of the number of rooms and (if claimed) of the abandoning of linoleum, venetian blinds and curtains.

Where a tenant owns a gas stove, the plumber's bill for disconnecting and re-connecting is treated as an allowable moving expense, and is included with the mover's bill in processing the Claim. The plumber is required to complete the form PLUMBING BILL (Form RC-3) and attach it to his bill.

This form provides for the following: date; name and address of plumber; name and address of tenant; description of work done; time started and finished; total hours; rate per hour; total charge. The plumber is supplied with two copies, one of which is to be submitted with his bill.

The RPCE makes up an identification card for each claimant. These cards are filed in alphabetical order, by account number within each letter. This is a working file for keeping track of the progress of each Claim. He records on the cards the following information, as it becomes available: account, block and parcel numbers; old and new addresses; moving date; moving allowance (mover's bill) or fixed payment for the specified number of rooms; transmittal number (i.e., number of the SCHEDULE OF APPROVED RELOCATION PAYMENTS sheet (Form RC-5; see below) with which the Claim was sent to the Comptroller); amount of claim; number or rooms (verified by the RA assigned to the family); indication that he has checked with the Cashier concerning the status of the rent; and what the status of rent is - either OK (paid to date) or amount owed. If rent is owed, the card is held out of the file.

As soon as the tenant is known to have actually moved, the VACATE NOTICE (Form RC-2) is completed and given to the Cashier. Also, the Claim is completed and given to the Site Office Manager for his signature. It is then ready to be sent to the Comptroller (see below, under Transmitting Claims). The RPCE then gets the SITE OCCUPANT RELOCATION RECORD card (Form SO-14; see Site Office

Relocation Records procedures) from the AA and fills in the blanks under "Permanent Relocation" (address and date moved); "Financial Assistance Granted to Family"; and "Relocation Payments."

When it is discovered that a tenant has moved without filing a Claim, the RPCE is notified (usually by the RA) and he puts through a VACATE NOTICE (Form RC-2), so the account will be taken off the rent roll.

TRANSMITTING OF CLAIMS

Except in emergency, the Claim forms are accumulated and sent to the Comptroller periodically as six or eight accumulate, accompanied by the form SCHEDULE OF APPROVED RELOCATION PAYMENTS (Form RC-5; referred to in the Office as the Transmittal Sheet). The form provides for the following information: transmittal number and date; columns for: account number; name; former address; new address; amount.

The form is made up in six copies: original for the Comptroller; one for the Executive Director; one for the Family Relocation division (to supply new addresses for their follow-up visits to families requiring social service); one for the AA for the official file; and two for public utilities (held until they come in to pick them up).

The public utilities are interested in move-outs, in order to know when to remove their equipment. Conversely, the Site Office is interested in tracing families who move without reporting their new addresses, and the public utilities furnish addresses of families receiving new service (see Site Office Relocation Records procedures).

The official copies of all transmittals are kept in chronological order, latest on top, in an Acco fastener. They are available to the RPCE and are usually kept on his desk during the day; but at night they are returned to a locked file.

CONTROL RECORDS AND STATISTICS

The RPCE maintains a numerical control of account numbers of tenants who have filed their Claims. He has two sheets mounted on the wall, numbered 0 - 1000 and 1001 - 2000. He stamps a red star beside the account number when the Claim is sent up to the Comptroller.

The RPCE also maintains a running analysis of all Claims (both residential and nonresidential), which is a transcript of the working file of identification cards described above (under Filing of Claims). This is set up on 12-column accounting paper, with a column for each of the following: account number; old address; new address; number of rooms; amount of residential claim; amount of commercial (nonresidential) claim (including moving expenses and property loss); date moved; transmittal number; payment record.

Monthly, the RPCE prepares for the Site Office Manager an analysis of all residential claims filed during the month. This analysis forms the basis of the Memorandum of Relocation Distribution (Form SO-29; see Site Office Relocation procedures) which is sent to the Executive Director by the Site Office Manager.

The analysis shows the number of tenants, and percent of total, relocated to specific sections of the city and suburbs, or out of state, for families and for one-person families; also a summary of the number at time of taking, number moved and number active, for families, one-person families and roomers.

FORMS - RESIDENTIAL CLAIMS

MSA NO.	TITLE OR DESCRIPTION[1]
RC-1	CLAIM FOR RELOCATION PAYMENT (HHFA-URA H-6140)
RC-2	VACATE NOTICE
RC-3	PLUMBING BILL
RC-4	Letter to accompany mover's bill
RC-5	SCHEDULE OF APPROVED RELOCATION PAYMENTS

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C-1	Ledger Card
SO-14	SITE OCCUPANT RELOCATION RECORD

[1] If a title appears on a form, this is written in all capital letters. If the form is known by a definite name, even though this is not printed on the from, it is written with the first letter of each word capitalized. A general descriptive term for the form is not capitalized.

The forms listed below the broken line are originated in other parts of the Site Office, but are also involved in some measure in the work of the Relocation Payment Claim Examiner.

CURRENT FAMILY RELOCATION PROCEDURES

AT THE

GOVERNMENT CENTER SITE OFFICE

OF THE

BOSTON REDEVELOPMENT AUTHORITY

VOL. II

RENT COLLECTION
PROPERTY MAINTENANCE

OCTOBER 1962

MANAGEMENT SERVICES ASSOCIATES, INC.
Management Consultants
93 WORTH STREET
NEW YORK 13, NEW YORK

CURRENT PROCEDURES

FOR

RENT COLLECTION

Government Center, Boston

The following procedures are those being followed at the Government Center Project.

They are reported in an informal, narrative style, reflecting the fact that they were developed through interviews with Site Office personnel. They provided the basis for the Recommendations set forth in Part III of the report, "A Comprehensive Family Relocation Program for the Boston Redevelopment Authority."

CURRENT PROCEDURES

RENT COLLECTION

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CURRENT PROCEDURES

RENT COLLECTION

The official Rent Roll is maintained in the office of the Comptroller, at 73 Tremont Street. In the Site Office, where all rents are collected, the rent records are maintained by the Chief Cashier and the Assistant Cashier (hereafter referred to as the Cashier and the Assistant).

The Cashier has set up a corresponding Rent Roll for his own use, columnized to show the amount of rent due from each account (by account number only - omitting names, etc.).

By correcting these amounts each time an adjustment is officially made, he has the correct total of rent charges to be posted on the first day of each month, which total should coincide with the Rent Roll total in the Comptroller's office.

TENANT ACCOUNT NUMBERS

1. Ledger Card

The basic accounting record in the Site Office is the Ledger Card (Form C-1)[1] for each site tenant, on which are recorded all payments of rent and miscellaneous information concerning the status of the account.

The form provides for the following information: name; address; account number; amount (of rent); and columns for: memorandum; line; date; transaction number; code; amount; symbol. It has 12 ruled lines for posting.

The "Memorandum" column is used for notations concerning specific transactions or circumstances. Most of the entries are made with rubber stamps, using red ink. (See discussions elsewhere in these procedures, as well as in the Site Office Relocation Records procedures, for details).

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[1] The number in parentheses (C-1) is the first of a series of numbers assigned by MSA for identification of all forms used by the Cashier. Where a title is printed on the form, it is written here in all capital letters. The legend of rubber stamps also is written in all capital letters.

The Ledger Cards are typed up from the SITE OCCUPANT RELOCATION RECORD and SITE OCCUPANT RECORD CARD - NON-RESIDENTIAL cards (Forms SO-14 and SO-15; see Site Office Relocation Records procedures). They are filed by account number in vertical posting trays. Only the Cashier and the Assistant have access to the Ledger Cards. When another member of the Office staff wishes to obtain data from, or stamp information on, the Cards, the Cashier or Assistant will pull the necessary Cards and work with the individual.

2. Account Number Cross-Reference Index

A visible cross-reference index between account numbers and tenants' names is maintained by the Assistant. This file is available to the Office and to other divisions wishing to use it, thus avoiding duplication.

NOTE: Throughout all these procedures for a Site Office, the staff of the Site Office Manager is referred to as the Office.

On GCP, the index is set up on 7" x 3/8" strips, in trays, in an Acme Flexoline desk-top unit.

Each strip contains the following information: account number; name; address; block and parcel number; amount of rent. The strips are filed in alphabetical order.

COLLECTION OF RENTS

NOTE: The term "use and occupancy charge" is the legally correct term used officially instead of "rent."

For convenience, the term "rent" is used in the Site Office and in these procedures (except when listing titles or contents of forms in which the official term is used).

1. Prorated Rents

On all projects, BRA sets a date when the first rent is due after taking - usually the first day of the month. In many cases, tenants (especially the non-residential) will have been paying rent from the 10th to the 10th or 15th to the 15th of the month.

Any tenant whose rent has been paid to the former owner for a period ending after BRA's date for first rent due is asked to establish the exact period covered by the payment by producing a photostat of the check with which it was paid (or by bringing the check in - the Cashier will send it to the office at 73 Tremont Street to have a photocopy made). The Ledger Card (Form C-1) for the

account is stamped PAID FORMER OWNER and the balance is left on his account until it has been paid by the former owner. The photostat of the check is retained in the Cashier's office.

Then the Cashier (or sometimes the Comptroller) writes a letter (not a form letter) to the previous owner, stating that he owes BRA a specified amount as the prorated portion of the rent for the space in question.

> NOTE: In prorating rent, the Cashier makes the figure divisible by 5, by raising or lowering the amount to the nearest five cents.

Usually, these letters are ignored. Therefore, during the second month after taking, a transmittal (not a form) is typed, listing: account number; name; address; block number; parcel number; amount of rent; amount paid; amount due from former owner. This is done once for each project, listing all unpaid balances, and sent to the Comptroller. There is no followup on these cases. If not paid in the meantime, the amount due is deducted from the final statement.

2. <u>Rent Waivers</u>

In the case of site tenants who own the buildings they occupy, BRA sets suitable rents at the time of taking. Provision has been made for BRA to waive collection of such rents until the time of final settlement, upon request of and written authorization by the respective owners.

The authorization may be made by means of a form letter known as the Owner's Rent Waiver (Form SO-22), prepared in the Office by the administrative assistant to the Site Office Manager (hereafter referred to as the AA), or by a letter drawn up by attorneys of a nonresidential tenant dealing directly with the Legal Department (for details, see Site Office Relocation Records procedures).

> NOTE: On GCP, the official title of the administrative assistant to the Site Office Manager is Relocation Payment Clerk - Relocation Assistant.

If Form SO-22 is used, the origianl is given by the AA to the Cashier, who forwards it to the Comptroller's office. When it is accepted by that office, a photostat is made and sent to the Cashier for his file. In like manner, the Cashier receives a photostat of the other type of letter from the Coordinator in the Legal Department.

When an accepted waiver is received, the Ledger Card (Form C-1) is stamped SIGNED WAIVER, and the rent accumulates until the final settlement is made. The copies of all waivers are kept in a folder in the Cashier's office, in order by

account number. The inside of the front of the folder is ruled (by hand) into the following columns: account number; block number; parcel number; name; address; rent per month; name known by (if a business). Each waiver is entered on this list when it is placed in the folder.

3. Rent Receipts

Residential tenants usually come to the Site Office to pay their rent in person. Nonresidential tenants send their rent checks in by mail. In either case, the account number is determined by using the cross-reference file (see above, under Tenant Account Records).

The first duty in the morning is to take care of all checks received by mail. The Cashier writes the account number on each check; pulls the Ledger Card for each number and sees whether the names match; and then prepares a Rent Receipt (Form C-2) for each check.

When a tenant comes in to pay his rent over the counter, the Cashier pulls the Ledger Card to see whether the payment being made covers the current month's rent. If so, he writes the dates of the current period (from - to) on the Rent receipt. If not, he writes "On account" on the Receipt.

NOTE: On GCP, there has been a problem in identifying the source of some checks from business firms. This is particularly true in the case of firms which pay from checking accounts carried in names other than the one given for the Rent Roll. (An example was a check signed by the Bowdoin Company in payment for the Salvation Army account.)

Sometimes the account can be identified by the return address on the envelope. Sometimes it is necessary to enlist the help of the Relocation Assistants (hereafter referred to as the RA's), who may recognize either the signature or the name of the company.

Sometimes it is necessary to take the return address, consult the map, find the block and parcel numbers, and ask the AA to locate the Site Occupant Relocation Record - Non-Residential (Form SO-15; see Site Office Relocation Records procedures) for the account. (These cards are arranged by block and parcel.)

The Rent Receipts (Form C-2) are prepared manually. The Ledger Cards (Form C-1) affected are pulled at the time the Receipts are made, and accumulated until mid-afternoon, when all are posted on the cash register at one time. In the event of posting errors, the Cashier uses the ADJUSTMENT SLIP (Form C-5; see

description below, under Adjustments of Rent), to correct them. These slips remain in his office.

> NOTE: On GCP, the Cashier makes out a Rent Receipt for all rent payments, with one exception. The managing agent for two of the buildings on the site deposits the rents he collects directly into the bank and sends to the Comptroller a list of amounts collected each day, identified by account number. The Comptroller, in turn, sends to the Cashier a master sheet on which are listed the account numbers, names and addresses, and amounts collected, by day. When he receives this list, the Cashier pulls the Ledger Cards and posts the amount to each Card.

The Rent Receipt is a 3-part, carbonized form, 5" x 3½", numbered in the lower left corner. It provides for the following information: account number; date; received from; amount; period covered; amount; signature of Cashier or Assistant.

The white (original) copy is retained by the Cashier; the blue copy is sent to the Comptroller daily (see below, under Daily Report to Comptroller); and the pink copy is either given over the counter to the tenant or, if payment was made by mail, given to the AA for filing in the individual account folder (see Site Office Relocation Records procedures).

Unused Receipts are kept under close control. They are put in the safe at night. Every number must be accounted for. If a Receipt is voided, the word "VOID" is written across it in red. The original and blue copies are then distributed in the same manner as valid Receipts (see above).

When a tenant who has received a 30-Day Notice to Vacate (Form SO-25; see Site Office Relocation Records procedures) makes a payment (whether full or partial), the back of his copy of the Rent Receipt is stamped with the following statement:

> THE AUTHORITY ACCEPTS THIS PAYMENT FOR USE AND OCCUPANCY ONLY AND DOES NOT WAIVE THE RIGHTS ACQUIRED IN ITS NOTICE TO VACATE GIVEN ON________________.
>
> BOSTON REDEVELOPMENT AUTHORITY

In addition, a form letter (Form C-3) is filled out and given or mailed to the tenant. This letter provides for the following: date; acount number; name and address of tenant; a statement which is a paraphrase of the legend of the rubber stamp above. It is signed by the Cashier or the Assistant. It is prepared in triplicate: original for the tenant; one copy for the collection

officer in the Comptroller's office; and one copy for the AA to file in the tenant's account folder.

Use of the stamp and form letter prevents the need for issuing another Notice to Vacate, in case the tenant falls behind again. Thus, if the tenant pays regularly, he may remain on the site (unless in a priority area); but if he falls behind again, he will then be processed by the Board for eviction.

4. Tracing Tenants

When a tenant moves without paying the rent due, the AA traces the tenant and attempts to collect the rent. Once a month, the AA turns uncollected accounts over to the Comptroller (see Site Office Relocation Records procedures, under Tracing Tenants and under Rents) for collection by an agency.

If that agency is successful in making collections, it deducts its fee from the amount collected and sends the balance to the Comptroller. The Comptroller then sends a list of the accounts collected to the Cashier, who posts the full amount collected to the respective tenant's Ledger Card (Form C-1). The Comptroller's office reconciles the difference between the full amount posted and the amount remitted by the collection agency.

HANDLING OF CASH AND DEPOSITING OF COLLECTIONS

NOTE: On GCP, the Cashier's office is equipped with an NCR 6000 cash register for posting accounts. The machine produces a printed tape record of all postings, in addition to printing on the forms inserted for posting.

Only the Cashier and the Assistant operate the cash register. Each punches his own identifying key when posting. The Subtotal and Total keys are locked when not in use.

The office is also equipped with a safe.

1. Handling of Cash

A change fund (drawer bank) of $50.00 is maintained. The Cashier does not handle Petty Cash; this is under the control of the Site Office Manager.

As $500.00 in cash accumulates during the day (in addition to the $50.00 drawer bank), the Cashier removes it from the register and prepares a bundle to be placed in the inner money chest of the safe. Two keys are required to open this compartment. The Cashier has one and Brink's Armored Car Service has the

other. The cash remains in the compartment until Brink's comes to pick up the day's deposit.

A record of these drops is kept, to use in preparing the deposit slip for the day's receipts.

> NOTE: On GCP, the incumbent Cashier reports that daily collections have not exceeded $500.00 since his arrival. However, he has discussed with the Site Office Manager the method he would like to use in recording such drops (based on experience elsewhere), and has the Manager's approval.
>
> Hence, the remainder of this discussion of money drops is a description of what the Cashier will do, if he collects more than $500.00 in one day. <u>It is written as if it is what he does do.</u>

Each drop is recorded on a preprinted from DEPOSIT MEMORANDUM (Form C-4; no copy available). The form provides for: date; drop number; list of denominations of bills and coins; space for initials of person making up the bundle and of person verifying the count. This is a 2-part, carbonized form.

The Cashier fills out the date and drop number on both copies, and writes his initials in one of the spaces at the bottom of the form. Then he separates the copies. Using the original, he lists the number of bills and coins in each denomination which make up the bundle of cash. Holding this copy aside, he hands the cash and the duplicate copy of the form to the Assistant, who makes an independent count of the cash, listing the number in each denomination, and initialing the other space at the bottom. Then the two slips are compared and should be identical. The Assistant then initials the original.

The original of the DEPOSIT MEMORANDUM is wrapped around the bundle of cash, held by an elastic band, and the bundle is dropped into the inner money chest. The carbon copy is held to attach at the close of business to the Cashier's copy of the deposit slip for the day.

If a shortage is reported by the bank, the Cashier can refer to these duplicate DEPOSIT MEMORANDUM slips of all drops for each day.

2. <u>Depositing of Collections</u>

After posting the day's receipts, the Cashier reconciles the accounts and is ready to make up the deposit for the bank.

Daily, at about 3:00 P.M., all receipts are totaled, including the cash in the inner money chest (as recorded on the DEPOSIT MEMORANDUM slips). The $50.00 drawer bank is withheld and a bank deposit slip is made up for the rest. The

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Cashier makes up the deposit slip, listing all checks individually by bank number and amount. The blue (teller's) copy of the deposit slip is kept in the Cashier's office, and the carbon copies of the DEPOSIT MEMORANDUM slips for the day are attached to it. The white, pink and yellow copies are enclosed with the deposit and sent to the bank (which then sends the receipted yellow copy to the Comptroller).

The completed deposit (including deposit slips, checks and any cash not in the inner money chest of the safe) is put into a cloth bag and sealed. The Cashier makes out a Brink's tag for the amount of money said to be contained in the bag; makes a notation of that amount in Brink's receipt book; and deposits the bag in the outer money chest of the safe until the Brink's men arrive. Brink's receipt book is a book of permanently bound pages which provide for: date; consignee (name of bank); said to contain (amount of deposit); number of items (bags); receipted by. When the Brink's guard arrives, he assists in removing the cash from the inner safe and this is put in a bag and sealed. The guard then signs the receipt book in the column "Receipted by."

A record of guards' signatures is provided to the Cashier when the Brink's service is started at the beginning of a project. The service is provided on an automatic daily schedule until near the end of a project, when pick-ups are made only on request, as receipts warrant.

3. Daily Report to Comptroller

The form DAILY SUMMARY OF TENANTS ACCOUNTS RECEIVABLE (Form C-5) is prepared each day at the time the deposit is made up. This is a two-part, carbonized form, designed for use on the cash register.

In preparation for posting the form, the Cashier first takes a subtotal "X" reading on the register tape. This permits him to reconcile all the subtotals and correct any errors before printing the totals on the form.

Following this reading, he puts the form into the register and takes a "Z" reading. This clears the machine and prints the following items on the form:

Total charges for the day
Total debits for the day
Total payments received for the day
Total credits posted for the day.

In addition, the following information is typed on the form: project number; date; inclusive numbers of Rent Receipts issued for the day (including any which may have been voided); and the numbers of any voided receipts. The Rent Receipt

numbers on the Daily Summary must run consecutively and without interruption from one day to the next. Copies of voided Receipts are sent to the Comptroller with the others.

The Daily Summary is prepared and signed by either the Cashier or the Assistant and approved and signed by the Site Office Manager. The carbon copy is attached to the blue copies of the Rent Receipts (Form C-2; see above) and sent to the Comptroller the next morning, by hand. The Cashier attaches his copy of the deposit slip (with the DEPOSIT MEMORANDUM slips attached) to the original of the Daily Summary and files it in a folder, by month. The inside of the front of the folder has been ruled (by hand) to provide a 2-column schedule showing date and cumulative amount of deposits. This information is posted daily.

4. Monthly Report to Comptroller

During the month, the Cashier prepares for aging the accounts by separating the Ledger Cards as the rents are paid. Cards for accounts that are paid for the current month are removed from the Receivables tray and placed in the front section of a second tray. In the back section of the second tray are Cards for accounts vacated, paid in full. Remaining in the Receivables tray are all active accounts still unpaid and all that have vacated with a balance due. He also uses a color-coded tab system to identify Cards in these four categories: credit balance; vacated with balance due; 30-Day Notice and over; evicted.

On the last day of the month, the Cashier ages the accounts receivable and keeps a breakdown for 30-, 60-, 90- and 120-day totals due. This breakdown ties in with the Federal form MONTHLY REPORT ON PROPERTY MANAGEMENT (63-R 905.2), which is prepared in the Comptroller's office. The total of the breakdown in the aging section of that form should agree with the total accounts receivable outstanding at the close of business on the last day of each month at the Cashier's office.

The form ANALYSIS OF TENANTS ACCOUNTS RECEIVABLE (Date - end of current month) (Form C-6) is used to send additional information to the Comptroller for inclusion in the Report 63-R. This form provides for the following: project name; date; number of tenants and amount due in each of the following categories:

Tenants evicted owing use and occupancy charge
Tenants vacated owing arrears
Tenants in bankruptcy owing arrears
Written agreements authorizing settlement at closing
Tenants in hardship status (no action taken)

Tenants' accounts under Management Contract
Current active tenants' accounts
Total accounts receivable, (date)

The form also provides for the following, as footnotes: tenants' accounts in hands of private contractor for collection; tenants evicted; vacated arrears.

The total on this form must coincide with the total on the list of aged accounts (see above) and with the total accounts receivable outstanding at the close of business on the last day of each month.

The form is made up in duplicate: one copy to the Comptroller; and one filed in the Cashier's office.

In addition to the work sheets for the foregoing data, the Cashier has set up another, which he calls Tenants' Accounts Receivable Sheet, on which to keep a running daily ledger balance of the outstanding accounts receivable. The sheet has 5 columns: rent changes or reductions; rent refunds; accounts receivable; net debit or credit balance; and daily ledger balance.

At the close of business on each Friday, he takes a trial balance by adding all the accounts receivable on the Ledger Cards and the total of this tape should agree with the amount on the work sheet.

RENT ROLL CHANGES

1. Adjustments of Rent

The Cashier receives authorization to make rent adjustments from the following: Site Office Manager; Assistant Manager in charge of property management; Superintendent of Maintenance; and the Real Estate office. The form NOTICE OF CHANGE IN USE AND OCCUPANCY CHARGE (Form SO-20; see Site Office Relocation Records procedures) is used to notify the Cashier.

Any adjustment of rent in the Cashier's records must be supported by an ADJUSTMENT SLIP (Form C-7). This is a 2-part, carbonized form, 6" x 2¼" in size, which provides for the following information: date; name; account number; 3 columns (ruled for 4 lines) - explanation, debit, credit; project number; approved by. It must be approved by the Site Office Manager. The original is retained by the Cashier; the copy goes to the Comptroller.

NOTE: The ADJUSTMENT SLIP is also used to correct posting errors.

If an error is discovered in the posting, it is corrected by posting a debit or credit on the Ledger Card (Form C-1), as necessary, and Form C-7 is made out to explain why the debit or credit was put through the machine.

Both copies of the Slip are retained by the Cashier, when used for this purpose.

It is also used to record payment of rent refunds (see below, under Vacated Accounts).

Upon receipt of the Notice of Change, the Cashier makes up an ADJUSTMENT SLIP and gives it to the Site Office Manager for approval. He also corrects the Ledger Card.

The Cashier files the original of the Notice in a folder, by account number, and gives the carbon to the AA for posting to the affected Site Occupant record card (Form SO-14 or SO-15; see Site Office Relocation Records procedures). This posting is done promptly and the copy is then sent to the Comptroller by the AA. The copy of the approved ADJUSTMENT SLIP is also sent to the Comptroller.

There are a number of reasons for adjusting rents after taking, each of which requires use of an ADJUSTMENT SLIP:

a. Error in setting the rent at time of taking (see Site Office Relocation Records procedures).

The Cashier receives the original of the Rent Affidavit (Form SO-19) and a photostat of the tenant's last rent receipt from his previous landlord, if that is used to prove the error.

b. Adding new accounts (see Site Office Relocation Records procedures)

1) Discovery of a tenant overlooked in the original site survey.

A new account must be set up and the former owner must be debited.

2) On-site move from untenable residential quarters (after fire)

The original account is closed and a new one set up for the tenant at the new address, with a new account number.

3) On-site move for other reason

If a tenant moves out, after taking, and another moves into the space for the balance of the time before clearance, a new account is set up and the rent due from the new tenant is prorated.

c. Rent allowance made by the Maintenance Section (see Maintenance procedures)

1) To former owners who perform janitorial services for their buildings

If the allowance is set at the time of taking, no ADJUSTMENT SLIP is needed. One is needed for changes or late additions.

2) To a tenant whose electric meter covers both the tenant's space and a public hall.

These are usually made after taking.

d. Reduction in rent for loss of business or reduction in space occupied (see Site Office Relocation Records procedures)

e. Waiving of unpaid balance of rent in a hardship case (see Site Office Relocation Records procedures)

f. Removing a tenant from the Rent Roll

The rent charge is put on the records at the Comptroller's office on the first of each month. When a tenant moves during the month, the rent is prorated and a refund is made.

If the tenant moves on the last day of the month, but the Office does not learn of this until several days later, the rent charge for new month must be removed from the account record.

2. Vacated Accounts

When a tenant has been relocated (i.e., actually moved off the site), the Cashier is formally notified by means of the VACATE NOTICE (Form RC-2). This form is prepared by the Relocation Payment Claim Examiner at the time the tenant comes in to file his CLAIM FOR RELOCATION PAYMENT (HHFA-URA H-6140; RC-1), but is not given to the Cashier until the move has been completed (in case of unforeseen delays).

The VACATE NOTICE provides for the following information: name, address and account number of tenant; date of moving; date rent ends; amount of current rent; project number; prepared by. The lower part of the form is for the Cashier's use. It provides for: account number; amount of credit to tenant's account; explanation; posted by; approved by.

The Cashier computes the amount of rent refund (if any) due the tenant and fills it in on the lower part of the form. If a refund is due, he prepares the AUTHORIZATION FOR RENT REFUND (Form C-8; see below), adds it to the list of RENT ROLL CHANGES - MONTH OF (current month) (Form C-9; see below); places a red V beside the account number in the Account Number Index File; and stamps the Ledger Card (Form C-1; see above) VACATED and the date.

The VACATE NOTICE is then filed in a folder by account number. There is a separate folder for each month.

The AUTHORIZATION FOR RENT REFUND (Form C-8) is a 2-part, carbonized form, 5½" x 4¼" in size. It provides for the following information: date; account number; name; new address, including apartment number; rent paid for period from - to; date vacated; refund due for (number of) days. The lower part of the form provides for: computation of rent refund; approved by; date paid; check number; amount of refund (debit to tenant's account); posted by.

This form is prepared by the Cashier and approved by the Site Office Manager. The carbon copy is sent to the Comptroller, who sends the check to the new address (as given on the form). The original is held by the Cashier.

The Comptroller notifies the Cashier by telephone of the date the rent refund is paid and the check number. The Cashier pulls out his copy of the AUTHORIZATION FOR RENT REFUND; takes the Ledger Card from the tray; posts a journal debit on the Card; and marks his copy of the Authorization as posted by him and the date posted.

An ADJUSTMENT SLIP (Form C-7) is made out manually. The tenant's name and account number, the date and the words "Rent Refund" are written on it. The original is retained by the Cashier and the copy is sent to the Comptroller.

3. Rent Roll Change Sheet

All changes in rent are reported to the Comptroller on the form RENT ROLL CHANGES - MONTH OF (current month) (Form C-9). This form is an 8½" x 11" sheet which provides for the following information: project number (in upper right corner); columns for: account number; deduction; addition; reason for change. It is prepared by the Cashier and signed by the Site Office Manager.

The changes listed on this form include all the adjustments made during the month (see above, under Adjustments of Rent). Since the Comptroller keeps the official Rent Roll and the charges are put on the Roll for the first of each month, this sheet notifies him of the changes to be made. This form is made up as often as the accumulated changes warrant - usually on the 10th and 20th and always on the last day of the month. It is made up in duplicate: original to the Comptroller; carbon copy filed in one folder, in order by month (usually only two or three sheets per month).

FORMS - RENT COLLECTION

MSA NO.	TITLE OR DESCRIPTION[1]
C-1	Ledger Card
C-2	Rent Receipt
C-3	Letter accepting payment without waiving right to evict
C-4	DEPOSIT MEMORANDUM
C-5	DAILY SUMMARY OF TENANTS ACCOUNTS RECEIVABLE
C-6	ANALYSIS OF TENANTS ACCOUNTS RECEIVABLE
C-7	ADJUSTMENT SLIP
C-8	AUTHORIZATION OF RENT REFUND
C-9	RENT ROLL CHANGES - MONTH OF (Current month)

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RC-1	CLAIM FOR RELOCATION PAYMENT (HHFA-URA H-6140)
RC-2	VACATE NOTICE
SO-14	SITE OCCUPANT RELOCATION RECORD
SO-15	SITE OCCUPANT RECORD CARD - NON-RESIDENTIAL
SO-19	Rent Affidavit
SO-20	NOTICE OR CHANGE IN USE & OCCUPANY CHARGE
SO-22	Owner's Rent Waiver
SO-25	30-day Notice to Vacate

[1] If a title appears on a form, this is written in all capital letters. If the form is known by a definite name, even though this is not printed on the form, it is written with the first letter of each word capitalized. A general descriptive term for the form is not capitalized.

The forms listed below the broken line are originated in other parts of the Site Office, but are also involved in some measure in the work of the Cashier.

[illegible]

CURRENT PROCEDURES
FOR
PROPERTY MAINTENANCE

Government Center, Boston

The following procedures are those being followed at the Government Center Project.

They are reported in an informal, narrative style, reflecting the fact that they were developed through interviews with Site Office personnel. They provided the basis for the Recommendations set forth in Part III of the report, "A Comprehensive Family Relocation Program for the Boston Redevelopment Authority."

CURRENT PROCEDURES

MAINTENANCE SECTION

TABLE OF CONTENTS

CURRENT PROCEDURES

MAINTENANCE SECTION

The maintenance aspect of property management is carried on at the site level by a Maintenance Section under the supervision of a Superintendent of Maintenance.

> NOTE: On GCP, the Superintendent of Maintenance reports to the Assistant Manager in charge of property management.

BEFORE DATE OF TAKING

1. Building Survey

Prior to the taking, the Superintendent personally makes a survey of all the large buildings where there may be problems. He studies the heating systems and talks with the building employees. One of his men surveys the other buildings.

Using the form MAINTENANCE SECTION - BUILDING RECORD (Form M-1),[1] they obtain the following information: name of building management firm, if any; name, address and phone number of owner, superintendent (if any), janitor; description of building; full information about utilities, fuel, building services; whether apartments are furnished; ownership of refrigerators; names, salaries and working hours of all building employees, as a preliminary to transferring them to the BRA payroll after taking; and information about sprinkler systems and automatic alarms.

When the survey is completed, the sheets are grouped by block and by parcel within block. They are stapled together by block and used for reference.

The information concerning building management firms is transmitted to the Board.

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[1] The number in parentheses (M-1) is the first of a series of numbers assigned by MSA for identification of all forms used by the Maintenance office. Where a title is printed on a form, it is written here in all capital letters. The legend of rubber stamps also is written in all capital letters.

The information concerning salaries of building employees is verified by requesting a letter from each building owner stating the hours of work, salary and social security number of each employee. (This is necessary because some of the men know only the amount of their take-home pay, or may give an inaccurate figure.)

2. Interviews with Residential Owners

Owners of all residential properties on the site are interviewed by the Superintendent, to find those who are willing to continue to provide the same services to tenants as they have been accustomed to provide. They are told that they will receive an allowance for the performance of these services. This will be in the form of a rent adjustment, except for those who own two or more buildings and would have more due them than the amount of their own rent. These are put on the payroll with the other temporary building employees.

The services include: turning the lights on at night; putting out and taking in the trash barrels three times a week; and cleaning the halls.

> NOTE: On GCP, all insisted on a flat $5.00 per month per apartment. On a previous project, he had been able to work out different rates with individual owners.
>
> There are four or five of these owner-janitors on the GCP payroll as monthly employees.
>
> In exploring their willingness to continue performing these services, the Superintendent avoids calling them "janitors," a term they resent, and speaks of "taking care of the building as you used to."

3. Inventory of Fuel on Premises

A list is made up from the original survey sheet, containing the building address and the type of fuel used. A man is sent out to check on the amount of fuel on hand. In the case of oil, he reads the gauge and records how full the tank is. A light oil gauge registers fullness of tank in fractions - 3/4, 7/8, etc. A heavy oil gauge registers inches, which are interpreted into gallons by means of a chart. In the case of coal, he estimates the quantity by applying a formula,

and gets the agreement of the owner. In the process of making this check, he observes and records such things as broken gauges, etc.

It is not possible to obtain complete information, because some of the people do not understand the reason and will not permit access; but so far as possible, he obtains a fair record of the tanks at time of taking. Also, where possible, he records the name of the company supplying the fuel.

4. Refrigerators

Because of their installation, gas refrigerators and built-in electric refrigerators are considered part of the property, but movable electric refrigerators revert to the owners.

In the case of movable electric refrigerators, the Superintendent arranges with the owners to leave them in until the premises are vacated, and arrives at an acceptable figure for rental.

> NOTE: There are no movable electric refrigerators on GCP. The rental figure set on a previous project was $5.00 per month.

AT TIME OF TAKING

1. Hiring Temporary Building Employees

During the first days after taking, the Superintendent has all the building employees come to the Site Office and makes up a payroll sheet for each. This is on a form INTER OFFICE MEMO - TEMPORARY MAINTENANCE EMPLOYEES (Form M-2).

> NOTE: On GCP, because there were approximately 60 men on the project, he obtained the assistance of two men from another division to speed the process.

These sheets are filled out in longhand and a number is assigned to each one, as they are made up, for the purpose of identifying the individual.

The sheets are typed up in triplicate and signed by the Superintendent and the Site Office Manager. The three copies are then sent to the Executive Director, who signs all three. One copy is for the Executive Director, one for the Comptroller and one comes back to the Superintendent.

They are kept in a folder in the file. When a man is let go, his sheet is transferred to an inactive folder, but all sheets are retained until the end of the project.

A list is typed up of all the men, giving the name of the man and the address(es) of the building(s) where he works.

There are two payrolls for the temporary building employees - one weekly and one monthly. The distinction is based on amount of work and salary and/or convenience, rather than status or type of work. As mentioned above, owner-janitors of residential buildings, where the allowance would exceed their rent, are carried on the monthly payroll.

The payroll is set up as speedily as possible, so there will be no interruption in the pay of the men.

2. <u>Building Management Firms</u>

The Superintendent is notified by the Board as to which buildings, if any, are to continue under the management of the firms who performed this function prior to taking.

NOTE: On GCP, one firm continued to manage two buildings.

3. <u>Fuel - Ordering</u>

At the time of taking, the Maintenance office may be too busy to handle the ordering of fuel. The Superintendent will then instruct the tenants of the buildings to continue to deal with their own fuel companies as before, until Maintenance can take care of the matter.

NOTE: On GCP, the Superintendent arranged to have one company (which he had dealt with on previous projects) take over all the residential deliveries, pending the taking of bids by the Board (see Fuel Accounts, below).

4. Fuel - Claims for Reimbursement

A form letter (Form M-3) is sent to the former owner of each parcel, at the time of taking, stating the fuel inventory and asking him to contact the Site Office if there is any question about it. The letter is signed by the Site Office Manager.

If a claim for reimbursement for fuel is made in any case where a physical check was not made before taking, the Superintendent asks the claimant for the last two delivery tickets prior to the date of taking. Then he computes the rate of consumption and estimates the amount remaining at the time of taking.

Another letter (Form M-4) is used to request the last delivery ticket prior to taking, for the purpose of establishing the price paid. It is signed by the Superintendent.

5. Utility Accounts[1]

When owners are notified by BRA of the taking, they notify the utilities to close their accounts.

When an owner calls Boston Edison, instead of an automatic transfer to BRA, all such accounts are forwarded to a Boston Edison representative who handles BRA accounts.

AFTER TAKING

1. Time Sheets for Temporary Employees

Each of the building employees must come to the Site Office at the end of his work period (week or month) and sign a time sheet showing the exact days and hours worked during the period. If there has been any variance from the schedule recorded on his payroll sheet, it must be explained in a covering memorandum, addressed to the Executive

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[1]See Appendix for discussion of a new method being developed for identification of electrical accounts to be transferred to BRA.

Director, which is attached to the time sheet. If a man is out, he is not paid for the time he was not working.

The work week ends on Wednesday and weekly employees come in on Thursday to sign. The work month ends on the last day of the month and monthly employees come in on the first Thursday after the first day of the month to sign. If a man is out ill on the day the time sheet must be signed, the Superintendent fills in a time sheet with the days the man actually worked and sends it to the Comptroller with the other time sheets, so the man will be paid.

The form WEEKLY TIME SHEET (Form M-5) is used for both weekly and monthly employees (the words "monthly" and "month" are written in). Only one copy of the Time Sheet is made up. It is signed by the employee, by the Superintendent and by the Site Office Manager. The covering memorandum concerning variance is made up in duplicate and the carbon copy is filed in the Maintenance office.

2. Fuel Accounts

The Board takes bids and awards contracts for light oil and coal deliveries to be made as soon after land acquisition as feasible. The contractors are informed that there will be a period of a few days during which deliveries from firms now supplying the buildings are terminated.

The contracts for light fuel oil include provisions for servicing the oil burners on the premises being served, at a fixed rate per hour.

On heavy oil, all companies who have been delivering in the area are retained. These companies service the burners in the buildings where they deliver oil, in a manner similar to those furnishing light oil.

> NOTE: Heavy oil is rationed - only a limited supply comes into the Boston area, by boat. Nobody is anxious for more business than he already has. To take on a new account, he would have to drop an old one, because he has only so much oil.

3. Fuel Deliveries

The ordering procedure depends on the type of fuel: coal, light oil, or heavy oil.

For coal, the janitor of the building comes in and tells the Maintenance office when more coal is needed, and it is promptly ordered. Orders are placed for loads of either 6 or 10 tons (standard truck capacities), depending on the building's requirements.

Deliveries of light oil are automatic. The companies estimate delivery needs on the basis of degree days. The tanks are filled on each delivery, unless otherwise instructed by Maintenance when a building is nearly empty. When there is only one tenant left in a building, the Superintendent notifies the oil company to stop making automatic deliveries and deliver only on order. Then the tenant is instructed to notify the Maintenance office when oil is needed.

For heavy oil, orders are based on notification by the janitor that the wall gauge indicates the reorder point has been reached. (This point is clearly marked on the wall for the benefit of any employee who might lack the training to read the gauge accurately.) Orders for heavy oil are for specific quantities, as the entire load must be delivered, once delivery is started (as against light oil, where the flow can be cut off automatically when the tank is full). The orders are placed for quantities that will result in a full tank.

If the janitor is on the premises when the fuel is received, he signs for the delivery. Since many of the men cover more than one building, very often they are not on hand at the time.

Whether signed by the janitor or not, delivery slips are not left at the buildings but are mailed in to the Maintenance office each day by the fuel companies. As fast as they come in, they are divided between the two men assigned to this task, who go to each location and check that the delivery has been made. In the case of oil, the man looks for a full tank (the actual quantity delivered is metered on the delivery ticket, so he doesn't check for quantity). On coal, the check is simply to see that the coal is there (the weight of the load has been checked and stamped on the ticket by a sealer).

After checking the delivery, the man signs the delivery ticket as O.K. The approved tickets are given to the Superintendent, who forwards them to the Comptroller.

> NOTE: On GCP, one firm refuses to mail delivery tickets and invoices to separate addresses, so sends both to the Comptroller. These delivery tickets are sent down to the Superintendent for checking of the deliveries, after which they are returned to the Comptroller.

4. <u>Utility Accounts</u>

BRA supplies utilities only when the former owner supplied them. Consequently, the Superintendent carefully checks all utility accounts being transferred and supplies the Comptroller with a list of approved accounts. Monthly, a list of changes in utility accounts is sent to the Comptroller.

When the Boston Edison representative (referred to above) has accumulated enough of the electric accounts to be transferred, he sends a list to the Superintendent in a form agreed upon - listing address, type of service, name of former owner and Edison account number.

The Superintendent checks all addresses, to be sure they are actually in the project area. BRA is responsible for public halls, lobbies, elevators, washrooms, oil burners and cellars (all "public meters"). If an account has been billed to an absentee owner, the Superintendent assumes it covers a public meter. But if it has been billed to an owner occupying space on the premises, he questions the account, to be sure it does not cover office quarters.

As soon as he has full information and has determined which are approved accounts, the Superintendent has a list typed up in triplicate: the original for the Comptroller, who will receive the bills directly from Boston Edison; 1 copy to Boston Edison; and 1 for the Maintenance office file.

In residential buildings, there may be some combined accounts - one meter covering electricity for both the hall and apartment on a floor. In such cases, the amount required to light the hall is determined and a rent adjustment is made for the tenant, who is then responsible for

paying the entire electric bill. Such combined accounts occur rarely, if at all, in commercial buildings.

Lists of approved gas and steam accounts are sent to the Comptroller.

The first bill to BRA on each account after taking, from all utility companies, shows clearly the prorated amount owed by the former owner up to the date of taking and by BRA after that date.

Water is supplied by the City of Boston. Immediately upon taking, without waiting for notification by the Maintenance office, the Water Department starts to remove water meters from all buildings in the area (these are a prime target for thieves), jumping the meters and thereafter estimating the water consumption on the basis of previous records.

5. Refrigerators

A memorandum is made up for the Comptroller, listing all apartments containing refrigerators to be rented by BRA. Payment for rent of these refrigerators is made by check each month to the respective owners. (The owners in these cases usually are not residents, so there is no rent to adjust.)

When an apartment is vacated, the Superintendent has the owner sign a receipt for the refrigerator as it is released. The original of the receipt is sent to the Comptroller.

> NOTE: Since there are no rented electric refrigerators on GCP, the procedure given above is what was done on a previous project.

6. Rent Adjustments

Rent adjustments are recommended by the Superintendent in three sets of circumstances: (a) in residential buildings, where the same meter covers electricity for both a public hall and an apartment on the same floor (see page 8); (b) in the case of former owners who continue to provide services to the tenants (see page 2); and (c) in the case of tenants with valid complaints that the usual janitorial services are not being performed.

The Superintendent investigates complaints about lack of service. If he finds them valid, he either arranges to restore service or, if this is not feasible recommends a suitable reduction in rent.

The form NOTICE OF CHANGE IN USE & OCCUPANCY CHARGE (Form SO-20) is used. This form provides for: name and address of tenant; apartment or floor number; project; old charge and period; new charge and period; effective date of change; prepared by; account, block and parcel numbers; code for reason; explanation; recommended by; approved by. It is a 2-part, carbonized form.

The Superintendent fills in the explanation and the amount of adjustment recommended and signs in the blank "Recommended by." He sends it to the Site Office Manager for approval. After it is signed, both copies go to the Cashier (see Rent Collection procedures).

7. Supplies

BRA supplies the buildings with paper towels, toilet paper, light bulbs, etc., if such things were supplied by the owners previously. Also, janitor's supplies are furnished: mops, brooms, disinfectants, cleaning materials, etc., as well as sand and rock salt. All of these are supplied in quantities necessary for the proper functioning of the buildings.

BRA is responsible for replacing regular glass in all windows and for plate glass in public lobbies (serving more than one tenant). However, other plate glass is the responsibility of the tenant, except as he can show in his last lease before BRA took over that the previous owner was responsible for replacing it.

Additional supplies stocked, for use in maintenance work, include: nails, assorted small hardware (kept in a cabinet that can be locked) and tools. Flashlights and batteries are kept in the Superintendent's office, as a control measure, but are issued on request as needed.

One man is in charge of the stock room. He is responsible for keeping the place in order and issuing the supplies, as well as for informing the Superintendent when additional quantities are needed. If he is sent out to replace a building employee temporarily, one of the other men takes over.

Supplies are issued on direct request of the janitors - they come in and ask for what they need. A record is kept of all issues. There is a clip board with ruled sheets - one per commodity - on which the man signs for what he has received: date, quantity and his name.

The PURCHASE REQUISITION (a BRA form) is used for ordering supplies. When stocks are low on certain items, the Superintendent is informed; or if he is ready to make out a requisition for something, he inquires or checks for himself to see if anything else is needed.

When he knows that the Purchasing Agent orders certain items from certain (or at least different) vendors, he does not combine such items with others on a single requisition, but makes out a separate one as needed. Also, if he has a rush item, he puts that on a requisition by itself, instead of combining it with less urgent items.

The requisitions are typed by the typing pool in the Office and signed by the Superintendent and the Site Office Manager. The white and pink copies go to the Purchasing Agent; the goldenrod and blue remain at the Maintenance office.

When the supplies are received, either the Superintendent or his assistant signs the delivery ticket. Delivery tickets are matched up with their requisitions and checked for completeness of delivery. If incomplete, they are held for complete delivery. When satisfactory (delivery completed), the goldenrod copies are signed by the Superintendent, the delivery tickets are attached and they are sent to the Purchasing Agent. The blue copies are retained in the Maintenance office.

No inventory record of supplies is kept. An effort is made to limit the kinds and quantities of items stocked.

Janitors are supplied on an as-needed basis, except that they are furnished extra light bulbs for making replacements between regularly scheduled replacement tours by the Maintenance staff (see under Code Compliance, below).

8. Extermination

When tenants come in to complain about roaches, the Superintendent gives them insecticide "bombs" and explains how to use them.

Control of mice and ants is the responsibility of the tenants. For control of rats, the office at 73 Tremont Street issues a blanket contract to a contractor at the start of the project. When service is needed, the Superintendent prepares a PURCHASE REQUISITION (see discussion under Supplies, above).

> NOTE: Distribution of insecticides is more economical than calling an exterminator at $8.00 per apartment, since such calls are worthless unless the entire building is treated.
>
> As to mice and ants, the Superintendent does not want to distribute poisons that could get into the hands of children.
>
> On previous projects, extermination of rats prior to demolition has been the responsibility of the demolition contractors. Since there will be more than one contractor doing the demolition on GCP, the Site Office will be responsible for the extermination, using the same contractor mentioned above.

9. Supervision of Building Management Firm

The building manager for the firm retained to manage two buildings on this project is under the direct charge of the Assistant Manager in charge of property management. When the building manager has a complaint he can't handle, he calls either the Assistant Manager or the Superintendent. The Maintenance Section does not do anything for the buildings that the building men should do, but does supply plumbers or electricians when necessary. (Only one plumbing contractor is used on these two buildings - he served them before and his men are familiar with them.)

If the Superintendent receives a complaint directly from one of the tenants, he takes it up with the building manager.

> NOTE: The relationships of private building managers to the Superintendent of Maintenance on other projects will depend upon the wording of the particular contracts. The above arrangements on GCP are indicative of the problems.

10. Code Compliance

BRA, as a City agency, must conform very strictly to codes. The Fire Department is especially apprehensive about projects.

In all buildings that have sprinkler systems, these must be kept working until a release is received from the Fire Department (by the Site Engineer) at the time of turning over to demolition. Some buildings also have supplementary alarm systems, although these are not required by law. Where these are already in the buildings, BRA continues the service until a release is received from the Fire Department after the building is vacant.

Light bulbs in all public areas of buildings on the project are replaced on a regular weekly schedule. A record is kept in the Maintenance office of the date on which each of the scheduled tours is made. (This record is for protection of the BRA, in the event of accidents and claims for negligence.) Between tours, bulbs are replaced whenever complaints are received of no light in a public area. Also, janitors are given extra bulbs for use between times. Only an emergency, like snow shoveling following a severe storm, is allowed to interfere with the regular replacement of bulbs.

Lights must be on at night in halls of residential buildings having four or more apartments. This is covered in the arrangements with the men who take care of these buildings.

A new procedure for elevator inspection has been worked out with the Building Department. When a complaint is received about an elevator, the Superintendent notifies the Chief Inspector, Elevator Division, Building Department, at City Hall, who sends an inspector to the address given. After assessing the minimum repairs needed, the inspector reports to the Maintenance office what must be done and says whether a permit is required for the work.

NOTE: A new elevator code is being prepared for 1964. Elsewhere in the city, repairs made now must conform to the new code. However, BRA is not being required to do this in project areas. Because the buildings will be razed at an early date, only the minimum needed for safety is required.

The repair job is then given to the elevator repair contractor in the regular way (see below). If the inspector requires a permit, the contractor must take it out at City Hall before starting work. He must state exactly what he is going to do on the particular job. (The permits cost from $3.00 to $12.00 and BRA pays for them.) When the work is completed, the contractor reports to the Maintenance office, which notifies the Chief Inspector and he sends one of his inspectors out to the building.

The Superintendent requires contractors to file permits on all plumbing jobs that involve gas, but not necessarily on all other plumbing or electrical jobs.

Under the rules of the Air Pollution Department, smoke is permitted only so many minutes in a given period of time. The Department recommends the type of coal to be used - it permits only a certain percentage (under 26%) of volatile gases by dry weight. Under certain circumstances, heavy oil will smoke when a burner is being started up.

11. Maintenance Operations - Handling of Complaints

As complaints are received, they are written down on form B.R.A. MAINTENANCE COMPLAINT (Form M-6), recording the name, address, date, time of receiving complaint, nature of complaint and name of person receiving it.

In an emergency like a broken pipe, a plumber is sent right away (see below for procedure). In the case of elevators, a special procedure is followed (see Code Compliance, above). In most other cases, however, one of the maintenance men goes out as soon as possible after the complaint is received, to check and see what is actually needed.

If he finds no one at home when he reaches the address, he fills in and leaves a slip (Form M-7) asking the tenant to call the office. The form provides for: name of occupant; date; time; a statement that the call was made in answer to the complaint; and a request to call the Maintenance office, giving telephone number and Work Order number.

Upon returning from the inspection trip, the man completes the remainder of the Complaint form ("Inspection Report"), showing either that it

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

was taken care of by Maintenance staff or that it is a job for a contractor, and signs the form. In the absence of the Superintendent and his assistant, the men handling complaints may refer to the list of contractors and assign the job to one of them. The name of the contractor is entered in the blank "Disposition" at the bottom of the form. If the job was done by Maintenance, both copies of the Complaint are filed, by street, in a card file drawer.

For each job given to a contractor, two forms are made out: MAINTENANCE AND REPAIR WORK ORDER (Form M-8) and CONTRACTOR'S JOB ORDER WORK SHEET (Form M-9). Except for the oil companies (burner service), the contractors come in and pick up the forms before going to the job. Work Orders are mailed to the oil companies and the Job Orders are not made up for them - they use their own forms.

The Work Orders are bound in books, three colors to a set, 50 sets to the book, numbered in the lower right corner of each sheet. Two copies (white and pink) are perforated; the third (blue) is permanently bound. Individual books are assigned to contractors who will perform most of the work (plumbers and burner service). One book is used for miscellaneous jobs, which are listed on the cover sheet as issued, for ease of finding.

The first two parts of the Work Order are a direct duplication of the Complaint form (Form M-6), except that "Disposition" on the Complaint becomes the third section of the Work Order, providing for contractor's name, description of work to be performed, date of order and Superintendent's signature.

The first three sections appear on all three colors, the fourth only on the pink and the blue. This section provides for a report on inspection of work completed - remarks, exceptions and signature of man who inspected.

There is provision for signature of Superintendent (recommending approval) and Site Office Manager (approving for payment). The section concerning invoices is no longer used, as all bills go directly to the Comptroller.

When the Work Order is made up, the original (white) is given to the contractor; the pink and blue remain in the book. The original of the Complaint is stapled to the pink copy and the carbon to the blue.

The Job Order was developed to supplement the Work Order. This form, made up in triplicate, includes the job address, contractor's name, Work Order number, nature of complaint, date and time given to contractor. Two copies are given to the contractor and the carbon copy is held in a work-in-process file. On completion of the job, the contractor fills in: description of work done; details of charges - materials and labor, including type of labor and actual time worked; other charges, if any. He signs it and returns the original to Maintenance.

Promptly, one of the maintenance men assigned to this work goes out and checks to see that the work required (and reported) was done; that the materials listed were used; and that the complaint has been satisfactorily taken care of. He signs the blank "Verified by BRA" at the bottom of the form. It is then ready to be checked against the Work Order and approved for payment.

The day's completed Job Orders are sorted by contractor and by Work Order number and interfiled (crosswise) in the respective Work Order books, which are then given to the assistant. The information concerning work done is filled in on the Work Order copies in the section on Inspection. As he completes each order, he staples the Job Order to the pink copy of the Work Order. When he has finished checking, the books are given to the Superintendent, who examines all orders checked that day and signs them as recommending approval. They then go to the Site Office Manager, who also looks them over and signs as approved for payment. The books then come back to the Maintenance office, where the pink copies are removed and sent to the Comptroller.

When a contractor is called to take a job, he is asked how soon he can get a man over. If there is going to be an unavoidable delay, sometimes the Superintendent goes to the address and explains to the tenants what is being done and the reason for the delay. He quickly drops any contractor who does not provide the prompt service he requires.

For emergency calls at night, an answering service is used. This service is furnished a supply of Complaint forms and a list of EMERGENCY TELEPHONE NUMBERS (Form M-10). This list contains the names of the Site Office Manager and the Superintendent, as well as the contractors and the services they provide (in the case of the oil companies, the specific addresses they cover). Except for elevator complaints, all night complaints are referred for action. Sometimes a contractor sends a man to patch things up and remove the source of danger and then completes the job in the daytime. This cuts down overtime. Elevator repairs are done only in the daytime, but the contractor is listed, in case of dire emergency.

The answering service mails in all Complaint forms each day, time stamped as to time of receipt and showing nature of complaint and to whom referred.

After giving night service, the contractor comes into the Maintenance office the next day and reports any calls he has taken. The Work Order and Job Sheet are written up at that time. Inspection is carried on as with other jobs.

The contractors and the Maintenance staff make no extensive repairs at any time without clearing with the Superintendent. For such repairs, the contractor prepares an estimate of the work that is involved and of the probable cost of the needed repair. If the estimate is under $100.00, the Superintendent decides; if over $100.00, he refers it to the Assistant Manager in charge of property management, who may approve expenditures for repairs up to $500.00; if over $500.00, it must be approved by the Assistant Executive Director or the Executive Director. In cases of very large expenditures, Board approval must be obtained.

The Superintendent is on call around the clock, seven days a week. The answering service, Fire and Police Departments and fire alarm services all have phone numbers where he can be reached outside of office hours. He is notified of and attends any fires or other emergencies (such as gas leaks, etc.). It seems to reassure the tenants just to see that he is there and to be able to talk to him and find out what is going on and what will be done to take care of them.

12. Structure Control

The Superintendent has a file of STRUCTURE CONTROL CARDS (Form SO-13), duplicates of the set in the Office file. This form provides for the following information: block and parcel number; description (of building); address of structure; owner; occupancy use (of building - residential, etc.); name of occupant; apartment; occupancy use (of occupant); date vacated.

On these cards will be recorded the intended date of moving, whenever possible to learn it, as well as the date actually moved.

The purpose of this file is to enable the Superintendent to keep track of buildings with reduced occupancy and aid him in determining: decreased fuel requirements; reassignment of janitorial staff; need to increase protection against vandalism; etc.

The information for the cards is supplied to him regularly by the Office. At present, he is receiving monthly reports. To supplement these reports with more immediate information, he also has a form WEEKLY STATEMENT OF BUILDING SERVICE EMPLOYEES RELATIVE TO REMAINING OCCUPANTS (Form M-11). This form provides for: date; address; block; parcel; name; possible vacant date. There are lines for 19 entries.

As the janitors come in each week to sign the time sheets, they are given these sheets to take with them. They fill in the names of all the tenants who still are in the buildings and, if they can find out, when they intend to move out. They bring the completed lists in each week and take more sheets. This will be continued until the buildings are entirely vacant.

A clerk posts the information to the respective STRUCTURE CONTROL CARDS.

13. Vacated Buildings

A vacant building remains the property and responsibility of BRA until it is released to the demolition contractor.

As soon as a building is vacant, the Superintendent promptly has all utility and water services cut off inside the structure.

> NOTE: It is the responsibility of the demolition contractor to have the utilities cut off at the street before starting to work.

The vacant building is immediately secured - windows boarded up and doors padlocked. Doors are used for boarding up windows and for propping against the inside of entrance doors.

The Superintendent must continue to police vacant structures against vandalism, theft, etc., and guard against fire. Where a sprinkler system exists in a building, it must be maintained until a release is obtained from the Fire Department; but he may convert from a wet to a dry pipe system, to avoid having to heat a large, empty building. In the case of fire alarm systems supplementing sprinklers, these are maintained until time for demolition. Upon receipt of a notification form from the Site Engineer, the Superintendent tells the alarm company that it may remove the equipment. It takes three to four days to remove such equipment.

APPENDIX

TRANSFER OF ELECTRIC ACCOUNTS FROM FORMER SITE OWNERS TO BRA

Under the present procedures, it is the responsibility of the former site owners to notify Boston Edison Company to transfer their accounts to BRA. This is not working entirely satisfactorily, as some of the accounts are not prompt in such notification. The result is that, if the Superintendent disallows such an account when it finally is submitted to him, Boston Edison has to go back and try to collect from the customer.

Working with the Superintendent on the problem, Boston Edison has developed a plan for identifying accounts in a project area promptly. Given the boundaries of a project area as soon as these are definite, they will print an IBM listing of all accounts in the area, coded in such a way that the Superintendent will be able to determine easily which accounts will become the responsibility of BRA at the time of taking.

The lists will be set up in the following columns: street, number, town, Edison account number, suite or service area, rate and meter number.

The codes for suites distinguish halls, basements, suites, floors, residential areas, etc. The codes for rates distinguish commercial (covering halls, oil burners, etc.), residential, high quantity (for heavy industrial machinery), hot water to the building (generally supplied from the oil burner) and commercial refrigeration.

This method of identifying the accounts will be especially useful in preparing for taking over new project sites.

The system has just been developed. A sample list was submitted with a letter from Boston Edison offering to provide the service. These were sent up to the office at 73 Tremont Street early in April for consideration.

FORMS - MAINTENANCE SECTION

MSA NO.	TITLE OR DESCRIPTION[1]
M-1	MAINTENANCE SECTION - BUILDING RECORD
M-2	INTER OFFICE MEMO - TEMPORARY MAINTENANCE EMPLOYEES
M-3	Form letter - concerning fuel inventory
M-4	" " - " price of fuel
M-5	WEEKLY TIME SHEET (also used for monthly)
M-6	B.R.A. MAINTENANCE COMPLAINT
M-7	Notice of Visit
M-8	MAINTENANCE AND REPAIR WORK ORDER
M-9	CONTRACTOR'S JOB ORDER WORK SHEET
M-10	EMERGENCY TELEPHONE NUMBERS
M-11	WEEKLY STATEMENT OF BUILDING SERVICE EMPLOYEES RELATIVE TO REMAINING OCCUPANTS

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SO-13	STRUCTURE CONTROL CARD
SO-20	NOTICE OF CHANGE IN USE & OCCUPANCY CHARGE
---	PURCHASE REQUISITION

[1] If a title appears on a form, this is written in all capital letters. If the form is known by a definite name, even though this is not printed on the form, it is written with the first letter of each word capitalized. A general descriptive term for the form is not capitalized.

The forms listed below the broken line are originated in other parts of the Site Office, but are also involved in some measure in the work of the Maintenance staff.